CAREER DEVELOPMENT PLAN REALTY SPECIALIST GS-1170 SERIES

UNITED STATES DEPARTMENT OF THE INTERIOR U.S. FISH AND WILDLIFE SERVICE DIVISION OF REALTY REGION 6



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Approved by _____

Chief, Division of Realty, R-6 U.S. Fish and Wildlife Service 134 Union Boulevard Lakewood, Colorado 80228

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PURPOSE

Career development plans for the Realty Specialist, GS-1170 Series are being prepared to 1) comply with U.S. Fish and Wildlife Service Manual, Section 232 FWS, Realty Training, 5.2 Policy, which states, "The Service will provide realty personnel with a comprehensive, individually oriented training program to develop the knowledge, skills, and abilities which will ensure the continuation of a high level of realty expertise." and 2) fulfill the intent of goal number 3, in the "Looking to the Future" document, which is "To develop a highly professional team with the knowledge, skills and abilities to meet the changing demands of the 21st century".

INTRODUCTION

The career development path for a Region 6 realty specialist has been an informal process involving a curriculum of classroom training, training from higher graded realty specialists and on the job work experience. This document is intended to act as the formal career development guidance for Region 6 realty specialists and should also be considered useful guidance in the preparation of Individual Development Plans.

Academic course work is divided into required courses and optional courses. Required courses must be successfully completed by the realty specialist at each grade level. The completion of the optional course work is strongly encouraged for those realty specialists wishing to develop a more broad appraisal background and expertise as a realty specialist. As the course work is successfully completed, the certificate of completion should be presented to the supervisor and maintained in the employee's authorized office personnel file. As work experience is gained and practical experience and training tasks completed, the employee and supervisor should discuss the outcome and agree that the tasks were or were not successfully completed. The course work and work experiences presented should not be considered as the only meaningful training for the GS-1170 series. As mission requirements change and new courses become available, this document should be updated to remain current and relevant to the training of Region 6 realty specialists.

Supervisors with newly hired staff at the mid and upper career levels, that previously worked at a state agency, other federal agency or in the private sector, should strongly consider assigning an upper career level mentor to the newly hired staff member. The mentor can help the new employee adjust to their new job and gain a sense of the history and culture of the Service. The new employee should also consider applying to the Region 6 Mentoring Program.

NOTE:

At the time this document was prepared, the Service was transitioning to DOI Learn for all classes offered by agencies of the Department of the Interior. The web addresses shown in this document will connect you to the DOI Learn page for registration. Before you can register for classes you must have a user name and password. The web page, http://training.fws.gov can help you to establish a user name and password.

REALTY SPECIALIST, GS-1170-05

Overview:

The GS-05 realty specialist is considered an entry level trainee. During this stage of career development, the basic building blocks of the realty specialist series are practiced and improved upon. The employee is introduced to a wide array of real estate and appraisal terminology, principles, practices and procedures. The knowledge and skills developed during this portion of the training process will be developed further and used throughout the employee's career.

The employee will learn the basic skills of the realty specialist series, such as, 1) how to write and interpret legal descriptions, 2) how to use court house records to identify encumbrances on real estate and determine ownership of real estate, 3) how to gather and verify real estate sales information, 4) how to use the Adjusted Assessed Land Value (AALV) process to value wetland and grassland easements, 5) how to use the appraisal process to value real estate, 6) how to use and complete various standard forms to acquire interests in real estate, 7) how to prepare case files for processing, 8) how to evaluate real estate for possible on site contaminants and 9) how to use biological criteria to evaluate real estate for potential fee or easement acquisition.

Additional skills are learned during this initial period of training such as, 1) proper font and format for written correspondence, 2) improving interpersonal skills, 3) use of word and data processing software and software specific to the realty program, 4) legislative authorities used by the Service to acquire real estate, 5) organizational structure of the employee's immediate work group, region and the Service, 6) history of the Service and the Small Wetlands Acquisition Program (SWAP), and 7) funding sources used by the Service to acquire real estate.

Technical skills involved in the valuation of real estate are learned through formal course work, testing and on the job experience. Other skills are taught to the trainee by higher graded realty specialists and reinforced through on the job work experience. Training will focus on improving job skills expertise and gaining the experience to work independently, with limited assistance from higher graded realty specialists. Assignments from higher graded realty specialists are designed to take the trainee step by step through the title search process, easement valuation process, easement option process and process of case preparation. Using repetition and building upon experience, the employee is able to work with only limited assistance from higher graded realty specialists, once all of the basic processes are understood.

Required Course Work:

1. <u>U.S. Fish and Wildlife Service Web Orientation Program</u>, LED5N46
This course is available through the National Conservation Training Center (NCTC) at anytime by going to (http://training.fws.gov/orientation). No registration is required. Found within the site are links to a variety of different sources of important information for a new Service employee. Some examples are the history and structure of the Service and Department of the Interior and information on Federal government benefits.

2. Land Environmental Site Assessment - Level I Procedures, TEC7174

This course is available at NCTC (http://training.fws.gov). Service policy requires that a Level I Contaminants Survey be prepared and kept in the file as part of the fee and easement acquisition, exchange and divestiture processes. The course provides training to the employee in the legal authorities, agency requirements, and methodologies to complete a Level I Environmental Site Assessment for land acquisition, transfer, disposal, or for cooperative agreements. This course is necessary in order that the trainee be able to complete case work independently.

3. <u>Basic Appraisal Principles</u>, Course 110

This course is available through the Appraisal Institute (www.appraisalinstitute.org). The course provides a background in real estate terminology, real estate markets and analysis, economic principles and a foundation in basic appraisal principles. The course is an introduction to the whole spectrum of valuation services and is not limited to any one specialty.

4. <u>Basic Appraisal Procedures</u>, Course 120

This course is available through the Appraisal Institute (www.appraisalinstitute.org). The course is an extension of the Basic Appraisal Principles Course 110. The course covers basic appraisal procedures, the valuation process, including the three approaches to value, defining the appraisal problem, collecting and analyzing data, reaching a final opinion of value and communicating the appraisal.

5. Land Title Institute, Course 1

This course is available on line through the American Land Title Association (<u>www.alta.org</u>). The course covers the unique terminology and basic principles of the land title industry, as well as methods and procedures used to perform a title examination.

6. Legal Descriptions

This is an on-line course offered free through the National Training Center of the Bureau of Land Management web site (www.ntc.blm.gov). The course can be accessed by going to the web site and clicking on "Legal Descriptions and Land Status" along the right side of the page, then go to the bottom of that page and click on the second "here" highlighted in blue.

The course consists of two modules. Module 1 teaches the participant to read and write legal descriptions using the rectangular survey system. Module 2 teaches the participant about Bureau of Land Management land status records and maps.

7. Uniform Act Tutorial

This web based course is offered free through the Federal Highway Administration (www.fhwa.dot.gov). The course is an interactive tutorial designed to provide the

participant with a basic understanding of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (Uniform Act).

This course can be found by going to the web site above, then click on "FHWA Programs" on the left side of the page; then under "Planning, Environment and Real Estate Services", click on "Real Estate Services"; then click on "Uniform Act" on the right side of the page; then click on "Uniform Act Training" on the right side of the page near the bottom.

8. <u>Uniform Act Web Course</u>, Course 141045C

The course is offered free through the Federal Highway Administration (www.fhwa.dot.gov). This course is designed to help participants recognize what steps they need to take when acquiring real estate for Federally-funded projects. Participants will be given an overview of the Uniform Act. The three key elements of the Uniform Act, valuation, acquisition and relocation, will be discussed. The process by which real estate is acquired will be defined, relocation benefits and services required by the Uniform Act will be identified and sources where relevant resource documents and materials can be obtained will be discussed

Registration for this course can be completed by going to the web site above, then click on "FHWA Programs" on the left side of the page; then under "Planning, Environment and Real Estate Services", click on "Real Estate Services"; then click on "Uniform Act" on the right side of the page; then click on "Uniform Act Training" on the right side of the page near the bottom; then click on "Web Course #141045C"; then click on "Register" at the top right of the page; then select "FHWA-NHI-141045-Real Estate Acquisition Under the Uniform Act: An Overview"; then complete the registration form and follow further directions

Practical Experience and Training:

1. Instruction in writing and interpreting legal descriptions

The three systems used to describe real estate, rectangular survey system, metes and bounds, and lot and block system, will be explained and demonstrated to the trainee. Most work performed by a realty specialist in Region 6 involves rural properties that are described using the rectangular survey system. Therefore, training will focus on the rectangular survey system with secondary emphasis on the metes and bounds method. Higher graded realty specialists will assist the trainee with assignments until the trainee becomes proficient in writing and interpreting legal descriptions using the rectangular survey system.

2. <u>Instruction in searching courthouse records</u>

The purpose, function and type of information housed at the various county offices such as, Clerk of Recorder, Treasurer, Director of Tax Equalization, Clerk of Court, and Auditor are explained to the trainee. Higher graded realty specialists instruct the

trainee how to search land title records, tax records, and records of judgement and liens. Working closely with higher graded realty specialists, the trainee builds on experience until such time as the trainee is able to work with a high degree of confidence and accuracy.

3. <u>Instruction in collecting, analyzing and verifying real estate sales information</u>
Each year, county multipliers must be prepared in order to utilize the AALV easement valuation process to acquire wetland and grassland easements. The ability to collect and correctly analyze real estate sales information is an important step in preparing the AALV multipliers, fee title appraisals, appraisals of rights-of-way and fee title exchanges. Higher graded realty specialists serve as instructors to the trainee, providing guidance as to the appropriateness of the sales used for various projects and how sales verification interviews are conducted with landowners. Discussion and visual inspection of the various agricultural land cover types that the trainee will encounter in the analysis of sales information is provided during field inspections.

4. Instruction in preparing Exhibit "A" maps

Exhibit "A" maps are one of the most important documents used by the U.S. Attorney to prosecute easement violations. The importance of well prepared, neat, and accurate Exhibit "A" maps cannot be stressed enough. Higher graded realty specialists provide the trainee with instruction in the use of the Arc-View Realty Extension software to map and determine wetland acres for wetland easements and to prepare maps for grassland easements. The maps prepared by the trainee receive close oversight by higher graded realty specialists and the supervisory realty specialist provides a critical second review during the AALV review process. As mapping skills and accuracy improve, the trainee receives less oversight during the process of map preparation.

5. <u>Instruction in the use of the Adjusted Assessed Land Value process</u>

The AALV process has replaced the appraisal process as the method used to value minimally restrictive wetland and grassland easements within the Service. Higher graded realty specialists instruct the trainee in the use of county multipliers, collection of assessed values, preparation of the AALV calculation sheet and determination of the easement value. Oversight by higher graded realty specialists will continue until the trainee is able to prepare AALV valuations with little assistance.

6. <u>Instruction in the use of biological criteria to evaluate real estate for fee and/or easement acquisition</u>

It is important for the realty specialist to understand the biological criteria and reasoning used to select one property over another as a potential site to be acquired in fee title or protected by easement. A detail of several days to a week at a nearby Wetland Management District (WMD) should be considered. While at the WMD, the trainee will accompany a refuge manager, biologist, biological technician, or Partners for Fish and Wildlife biologist, experienced in the ascertainment evaluation of real estate, during actual property inspections and evaluations. With oversight from the field biologist, the trainee

will be given the opportunity to complete evaluations of properties proposed for easement acquisition. Any follow-up training will be provided by higher graded realty specialists until the trainee understands the concepts and biology used in the evaluation process.

7. <u>Instruction in the Small Wetlands Acquisition Program (SWAP)</u>

It is important for the realty specialist to know the history and understand the details of how the SWAP program functions and how real estate transactions are conducted. Higher graded realty specialists will provide the trainee with instruction in the terms and conditions of the wetland and grassland easements. The employee will learn to explain both the SWAP program and the terms and conditions of wetland and grassland easements to landowners. The trainee should become familiar with the "Conservation Easements and Fee Title Acquisition Procedures Manual", as well as the manual entitled "Administrative and Enforcement Procedures for FWS Easements".

REALTY SPECIALIST, GS-1170-07

Overview:

The GS-07 realty specialist is considered a mid-level trainee. Assignments are of such a nature as to require the trainee to bring together the knowledge, skills and abilities learned as an entry level trainee, in order to complete more complex assignments. Under the tutelage of higher graded realty specialists, the employee's job proficiency increases and scope of responsibility begins to broaden. The employee is beginning to make measurable contributions to the overall goals of the SWAP.

The work assigned during this phase of training increases in difficulty and the trainee is less dependant upon higher graded realty specialists for guidance to complete work. The employee continues to improve skills associated with searching and utilizing court house records to investigate real estate title and encumbrances and complete the work necessary to make easement offers and prepare easement options. Increasingly complex practical work experiences and examples provided in educational classes, are used to improve the trainee's knowledge and ability to understand and apply appraisal principles, practices, procedures and approaches to value.

The trainee will become familiar with the completion and purpose of more than just the basic standard forms used to option easements and is responsible for preparing and submitting case files for assigned cases. Additional formal classroom and field work along with practical experience are used to further improve the trainee's ability to evaluate and report potential sources of contamination on real estate using the Level I Contaminants Survey. Field experience and guidance from higher graded realty specialists, along with a detail to a WMD, will improve the employee's understanding and use of biological criteria to evaluate real estate for potential easement and fee acquisition.

The number of easement offers made and optioned are expected to increase over the previous fiscal year. Experience and guidance from higher graded realty specialists provide the employee with an increased understanding of the AALV process. The employee is well versed in the details of the SWAP program and terms of the wetland and grassland easements and can explain the program to landowners with confidence and accuracy.

Higher graded realty specialists will explain and instruct the trainee in the requirements of Public Law 91-646 and state legislation affecting the acquisition of real estate by the Service.

Required Course Work:

1. <u>U.S. Fish and Wildlife Service Employee Foundations</u>, LED5240

This course is offered through the NCTC (http://training.fws.gov). Designed as a course for new Service employees, the focus is on providing the skills for working with others to accomplish the mission of the Service. Employees will learn the value of diversity and how to find common ground. The course provides an introduction to the U.S. government, public service, the conservation history of the Service, interpersonal communications, conflict resolution and team building.

2. Realty Academy, TEC7178

This course is offered through the NCTC (http://training.fws.gov) as a continuation of the

Employee Foundations course LED5240, which must be successfully completed as a prerequisite to the Realty Academy. Designed to focus on the Service Realty Program professional employees, the course helps to build understanding and cooperation among the diverse Realty Program disciplines. Case study examples are used to provide training in both the skills and techniques needed to continue a unified, successful Realty Program.

3. <u>Fundamentals of Rural Appraisal</u>, Course A-10

The course is offered by the ASFMRA (www.asfmra.org) as an introductory course covering the basic concepts, principles, procedures and the valuation process. The role of the rural appraiser and the level of performance required by the rural appraiser is also covered. Lectures and numerous examples and problems, along with a case study, are used to bridge between theory and practice. The student will develop an understanding of depreciation, income capitalization, sales analysis and the comparison process.

4. Principles of Rural Appraisal, Course A-20

Offered by the ASFMRA (<u>www.asfmra.org</u>), the course builds upon the basic appraisal concepts of Course A-10 and applies those concepts to the practical application of the appraisal process using problems, lectures and a case study. The course covers data analysis, application of methods to derive information from data, and the examination and interpretation of the soundness of mathematical conclusions.

NOTE:

Appraisal Institute Courses 110 and 120, recommended for completion during the GS-05 entry level trainee period, cover some of the same concepts, principles and procedures use to value real estate as ASFMRA Courses A-10 and A-20, described above.

Due to the appraiser consolidation within the Department of the Interior, Service trainees no longer have the opportunity to perform narrative appraisals that reinforce and develop basic appraisal skills through practical on the job application. Therefore, the appraisal skills that are not able to be developed on the job can, to a lesser degree, be supplemented with the experience gained through problem solving and case studies offered through course work. It is strongly recommended that the trainee complete the introductory appraisal courses offered by both the Appraisal Institute, Courses 110 and 120, and the American Society of Farm Manager and Rural Appraisers, Courses A-10 and A-20, to reinforce the concepts and skills of appraisal.

5. <u>Management, Personal Development and Interpersonal Relationship Training</u>
Attend a seminar or read a book that deals with effective management, personal development or interpersonal relationships. A list of books and seminars can be found in the attached addendum beginning on page 26.

Optional Course Work:

1. Basic Relocation, NHI # 141029

This course is offered through the Federal Highway Administration (www.fhwa.dot.gov) as an introductory course on relocation issues designed to broaden the knowledge of those engaged in the relocation of persons as a result of the acquisition of real property required for a federal or federally-assisted project.

The course can be found by going to the web site above, then click on "FHWA Programs" on the left side of the page; then under "Planning, Environment and Real Estate Services", click on "Real Estate Services"; then click on "Uniform Act" on the right side of the page; then click on "Uniform Act Training" on the right side of the page near the bottom; then click on "Training Courses"; then click on "Calendar of Events" at the top left side of the page.

2. <u>Performance Excellence Planning</u>, LED6W53

This is a web-based self study course offered on-line by the NCTC (http://training.fws.gov). The course is designed to help participants prepare for and deal with change, expand capabilities, increase self-esteem, enhance visibility and image in the workplace and maintain job enthusiasm. Participants gain an understanding and appreciation of their control over their future through an assessment of personal and professional growth, evaluation and selection of goals, developing an action plan to achieve their potential and improve job performance and direct and monitor the progress of their action plan to ensure personal and professional achievement.

To enroll in this web-based course, the employee should submit an application just as they would for a classroom course. Once the application is processed, the enrollee will receive an e-mail identifying a URL and a username and password to access the on-line course. Participants have 30 calendar days in which to complete the course. FWS participants who do not complete the course within the 30-day time frame will be charged \$60 to cover the cost of the username and password. To avoid this charge, employees should wait and apply for web-based courses when they know their schedule will permit completion of the course within the 30-day time frame.

3. Resolving Conflicts, LED6W50

This is a web-based course offered on-line through NCTC (http://training.fws.gov). Participants are shown how to explore a conflict and get to the heart of the problem and correct it.

Practical Experience and Training:

1. Regional Office Orientation

Realty specialists stationed at the field acquisition offices are primarily engaged in the

valuation of real estate, negotiation for real estate and the field level case processing that follows a successful negotiation. It is important for field level realty specialists to understand the role of the Regional Realty office and the other Service divisions that comprise the Regional office. A minimum one week detail to the Regional Realty office is recommended for every trainee stationed at a field acquisition office. The trainee will be given the opportunity to participate in the processing of fee, easement and rights-of-way cases, shown how statistical information and real property records are kept and maintained, how files are prepared for microfiche and how revenue sharing reports are prepared. The trainee will accompany higher graded realty specialists to meetings and briefings, be provided a tour of the Regional office with an explanation of the function of the other divisions, and share other work experiences with regional office staff as may be available.

2. Instruction in Completing an Easement Exchange

The duties of the realty specialist sometime involve exchanging a portion of the National Wildlife Refuge System (NWRS) for other land or interests in land of equal or greater value. The trainee will learn how exchanges are initiated by the refuge and WMD staff and sent to the State Refuge Supervisor and the Chief, Division of Realty for approval. The employee will learn to use the AALV process to value the interest divested and the interest acquired. Higher graded realty specialists will guide the trainee through situations involving dissimilar values and explain how they can be reconciled. The importance of keeping the divested interest case file with the acquired interest case file, when sending a completed exchange case file to the Regional office, will be stressed.

3. <u>Instruction in Preparing County Multipliers</u>

The trainee will assist higher graded realty specialists with the collection, analysis and selection of sales to be used in the preparation of county multipliers for easement acquisition. The trainee will learn to input data into the regression model and develop county multipliers. Higher graded realty specialists will show the trainee how to identify outlier sales that do not represent typical sales within the market area and can negatively affect the accuracy of the multiplier.

4. <u>Instruction in Completing an Opinion of Value for a Fee Acquisition, Exchange and/or Right-of-Way</u>

It is important the trainee be provided with opportunities to utilize the basic concepts, principles, and procedures used in the valuation of real estate that were learned in the classroom. The practical experience gained will help the employee to understand real estate markets, how to collect, analyze and select sales data, the affect highest and best use has on value, applicability of the three approaches to value, and the determination of the final estimate of value. Practical experience can be gained by assigning the employee to complete a less complex demonstration opinion of value. The opinion of value should be concurred with by the supervisory realty specialist or a qualified higher graded realty specialist and corrections made, if necessary. Application of the valuation skills learned from completing an opinion of value can be discussed with the trainee and further demonstration opinions of

value for rights-of-way and exchanges can be assigned, if considered necessary.

5. <u>Instruction in Surveying Real Estate</u>

It is important for the realty specialist to have an understanding of how real estate is surveyed for size, location and legal description. It is suggested that the trainee accompany one of the surveyors on a detail lasting at least one week in the field. The trainee will be given instruction in the purpose and use of equipment, legal requirements for cadastral surveys and other aspects of surveying.

REALTY SPECIALIST, GS-1170-09

Overview:

At the GS-09 level, the realty specialist is considered an advanced level trainee. During this stage

of career development, the trainee continues to improve upon the knowledge and perfects the skills and abilities developed and improved upon as a GS-07 level trainee.

Work assigned during this phase of training continues to increase in difficulty and scope. The trainee seldom requires assistance from higher graded realty specialists to complete work assignments. By this time, the employee is skilled in searching and utilizing court house records to investigate real estate title and encumbrances. The trainee is able to prepare easement and fee offers, prepare documents to clear title to real estate and prepare easement and fee options and case files. The employee is familiar with and understands the purpose of most forms and documents used by the Service to acquire real estate interests. More complex practical work experiences and examples used in educational classes have further improved the trainee's knowledge and ability to perform the duties of a realty specialist.

Practical field experience gained through work assignments has made the employee experienced in the evaluation and reporting of potential contaminants using the Level I Contaminants Survey. The employee has the knowledge and practical experience to correctly employ the use of biological criteria to evaluate real estate for potential fee and easement acquisition.

At this point in the training process, the number of fee and easement offers made and optioned are similar to the number of offers and options completed by journeyman realty specialists at the next higher grade. The trainee has a complete understanding of the AALV process including the development of county multipliers and easement chart indices and contributes to the annual report to the Director. The details of the SWAP program and the terms of wetland and grassland easements are thoroughly understood and can be explained by the employee in great detail. The trainee has a better than basic understanding of Public Law 91-646 and how the law affects the manner in which the Service deals with landowners in the acquisition of interests in real estate.

The employee is able to complete special assignments alone and contribute to teams or groups assembled to provide recommendations or solutions to technical and management issues. The knowledge, skills and abilities as a realty specialist are such that the trainee has become a productive member of the team that provides guidance and training to lower graded realty specialists and provides assistance to higher graded realty specialists during special assignments.

Required Course Work:

1. Management Skills for Non-Supervisors, LED6167

Offered through the NCTC (http://training.fws.gov), the course is a general introduction to management for those in non-supervisory positions. Students learn how to supervise others when they don't have the authority of a supervisory position. Topics covered include establishing rapport, cultivating influence, achieving trust, building relationships, planning and organizing projects and resources, building and leading a team, solving problems and making decisions and successfully implementing change.

2. Negotiation Strategies and Techniques, LED5102

The NCTC (http://training.fws.gov) course gives participants an interactive opportunity to practice techniques that are based on an interest-based negotiating process.

- 3. <u>Land and Real Estate Law Introduction for Federal Natural Resource Projects, TEC7171</u> The NCTC (http://training.fws.gov) offers this course to explore the laws, principles, and practices affecting the Federal land acquisition process, with emphasis on natural resource projects. Students are provided with an introduction to basic real estate law and examination of those laws, regulations, and guidelines specifically related to Federal land acquisition and disposal. The differences and similarities between the federal and private land acquisition process is discussed. Participants will learn how to integrate legal requirements into land acquisition and disposal actions.
- 4. <u>Management, Personal Development and Interpersonal Relationship Training</u>
 Attend a seminar or read a book that deals with effective management, personal development or interpersonal relationships. A list of seminars and books can be found in the attached addendum beginning on page 26.

Optional Course Work:

1. Basic Income Capitalization

This course is offered by the Appraisal Institute (www.appraisalinstitute.org) and provides participants with an understanding of the mathematical procedures used to analyze data and derive value opinions for income-producing properties. The theory and applicability of the income capitalization approach are reviewed along with the reasoning and concepts behind yield capitalization formulas.

2. Mathematically Modeling Real Estate Data, Seminar

This seminar is offered through the Appraisal Institute (<u>www.appraisalistitute.org</u>) and is designed to teach statistical model techniques including multiple regression analysis to the student. The potential strengths and weaknesses of automated valuation modeling are discussed. The student will learn that as data sets become more plentiful and personal computers allow for quicker analysis of data, statistical techniques for analyzing data become more meaningful.

3. Advanced Rural Appraisal, Course A-30

The course is offered through the ASFMRA (www.asfmra.org) as a thorough review of the appraisal process in addition to advanced rural valuation techniques covering a wide array of property types. Appraisal techniques will be enhanced by emphasizing market abstraction for components used in the three approaches to value and lease analysis. Technical appraisal skills are enhanced with income concepts such as discounted cash flow analysis, determining internal rates of return and equity dividend rates. Advanced application of depreciation, capitalization and market derived adjustments are presented. Practical

application is emphasized using problems and case studies.

4. Appraisal Report Writing, ALL-215

Offered through the ASFMRA (<u>www.asfmra.org</u>), the participant learns to communicate the necessary data, logic, reasoning and opinions used in the valuation process. The most immediate benefit of the course is an improved ability to write better, more efficient appraisal reports, and learning to maintain objectivity and writing without bias.

5. Conservation Easements

This seminar is available through the ASFMRA (www.asfmra.org) and focuses on the methodologies used for appraising conservation easements and the problems likely to be encountered. What constitutes a conservation easement and identifying the provisions of the easement are covered in the course. Highest and best use and selection of sales for the pre and post easement valuations in the before and after methodology will be emphasized. Diminution in value and easement restrictions in the post easement valuation process are discussed. Case studies and examples are used to reinforce the process used to value conservation easements.

6. Conservation Easements Valuation and Case Studies

Offered by the ASFMRA (<u>www.asfmra.org</u>), the course will stress the need to utilize sales grids to be consistent when trying to use the same sale in the before and after, and to show the factors to consider when developing ratios of sales in the before and after. Internal Revenue Service regulations on charitable contributions claimed for donations of conservation easements will be covered. Several case studies and various types of easements will be covered.

Practical Experience and Training:

- 1. Assist Regional Office with Complex Acquisition, Exchange or Disposal Project
 The GS-1170 series staff at the Regional office are generally engaged in larger more
 complex refuge projects within the region. These projects sometimes involve a combination
 of private landowners, other federal agencies, and state and local governments. Land
 transactions can involve fee acquisition, land exchanges, and disposal of lands. A
 combination of land transactions is also possible. Assisting Regional office staff will provide
 the employee with the experience of participating in more complex projects that offer new
 or alternate methods of problem solving, negotiating, case preparation, funding, and building
 support with the public. The training and practical experienced gained by assisting with
 complex projects will provide the employee with the knowledge and confidence to further
 improve the trainee's skills and ability to complete similarly complex work.
- 2. <u>Member of State Team Preparing Annual AALV Statistics and Recommendations</u>
 Each fiscal year a team from each of the SWAP states assembles and analyzes the number of options signed versus the number offers made, in order to determine acceptance rates for

wetland and grassland easements for the fiscal year. Director's Orders #164 and #170 require Regions 3 and 6 to report acceptance rates as a method to determine under payment or over payment for minimally restrictive easements within the SWAP. As a member of the state AALV team, the trainee will become familiar with the implementation and reporting requirements of both Director's orders and gain the knowledge and confidence to act as the team leader assigned to prepare future annual reports.

3. <u>Instruction in Plotting Metes and Bounds Legal Descriptions</u>

On occasions where land is being offered for sale or easement, a metes and bounds legal description will be encountered by the realty specialist. It is important that the realty specialist be able to plot the metes and bounds legal description in order to produce accurate exhibit maps and interpret metes and bounds legal descriptions. Higher graded realty specialists or the supervisory regional land surveyor can provide the training for the employee to become proficient in plotting metes and bounds legal descriptions.

4. <u>Instruction in the Legislative Authorities and Funding Sources Used to Acquire Interests</u> in Real Estate

There are several administrative acts that authorize the Service to acquire real estate interests. Some of the acts are funding specific and allow for a relatively narrow interpretation of their use, while others are not funding specific and can be interpreted as allowing a more broad use of funding sources and uses for acquisition. The trainee should become acquainted with those acts recited in the wetland and grassland easement documents, as well as fee title option documents. The act most relevant to the work performed by the employee is the Migratory Bird Hunting and Conservation Stamp Act.

A synopsis of the acts used by the Service are complied in the *Digest of Federal Resource* Laws of Interest to the U.S. Fish and Wildlife Service (April 1992) available through the Office of Legislative Services. The publication is also available on the Services website (www.fws.gov) by selecting "Index" on the left side of the page, then selecting the letter "P", then moving down to "Publications", then selecting "Online Publications", and then scrolling down to the above referenced digest.

5. <u>Assist Regional Office Staff in the Preparation of the Land and Water Conservation Fund</u> (LWCF) Briefing Book

Briefing Books are provided to the Appropriations Committees, the Committees of Jurisdiction, the Secretary of the Interior, the Service Directorate and, upon request, to individual members of Congress. A well prepared Briefing Book supports and is important to the success of the annual Region 6 land acquisition budget request. The Briefing Book contains project narratives, detailed project status sheets, and maps for each LWCF project in the region.

The employee will gain an understanding of the purpose and scope of the Briefing Book, as well as develop an understanding of other land acquisition projects within Region 6.

6. Detail to the Great Falls Acquisition Office, Great Falls, Montana

As the number of conservation easements in western Montana continues to grow, realty specialists should become familiar with the terms and negotiations of these easements. A 1 to 2 week detail will provide the realty specialist with an understanding of how partnering with private conservation organizations and landowner groups has resulted in landscape level easement initiatives. The realty specialist should become familiar with the "Administrative and Enforcement Guidelines for Conservation Easements" manual prior to the detail.

REALTY SPECIALIST, GS-1170-11

Overview:

At this level of career development, the realty specialist is no longer a trainee and is considered a journeyman level realty specialist.

The employee is extremely skilled in utilizing court house records to determine the disposition of real estate title and encumbrances. Being extremely knowledgeable in the preparation of fee and easement options, documents to clear title, and forms used by the Service to acquire real estate interests, the employee is capable of training and providing guidance to lower graded realty specialists.

Practical field experience has made the employee very knowledgeable in the evaluation and reporting of potential contaminants as well as using biological criteria to evaluate real estate for potential fee or easement acquisition. At this level, the employee makes significant contributions toward regional land conservation goals through the number of offers made and cases optioned.

The knowledge and understanding of Public Law 91-646 and how the law affects the manner in which the Service acquires interests in real estate is extremely good. The employee is extremely knowledgeable in the details of the SWAP and terms of both wetland and grassland easements and can explain all in great detail. The journeyman realty specialist is extremely knowledgeable in the development of county multipliers and easement chart indices and is capable of acting as the team leader in developing the state data for inclusion in the annual report to the Director. The employee possesses all of the knowledge, skills and abilities necessary to complete all, except the most complex of work assignments, with little or no supervision. Work assignments now include more complex assignments that are regional in scope and designed to further develop knowledge, skills and abilities. The employee is familiar with the Regional overhead and land account budgeting process.

Required Course Work:

1. <u>Land Acquisition and Disposal for Federal Natural Resource Projects</u>, TEC7172 Offered by the NCTC (http://training.fws.gov), the course provides intermediate instruction on real estate principles and practices related to Federal land acquisition and disposal. Topics covered include procedures and training regarding the requirements for land acquisition and disposal, transfers, withdrawals, exchanges, donations, Department of Defense Base Closure Program, Uniform Relocation Assistance, Real Property Acquisition Policies Act, Department of Justice Title Standards and contaminants survey issues.

2. Congressional Office Seminar, EXC5119

Offered by the NCTC (http://training.fws.gov), this course explores different aspects of Congress, Congressional process and procedures, and how they affect Service operations. The course is conducted on Capital Hill to give participants firsthand understanding of Federal law-making and Congressional culture. Students are given the opportunity to hear from and ask questions of Congressional members and their staffs, political scientists, lobbyists, the media, and Service legislative affairs and budget office personnel. Participants also attend Congressional hearings and observe house and senate floor action.

3. Essential Skills of Communicating, LED6W49

This is a web-based course offered through the NCTC (http://training.fws.gov) that deals with the basics of effective communication between a supervisor and an employee. Supervisors learn how to design clear concise messages, look for non-verbal clues, listen to communicate and overcome barriers to understanding.

4. <u>Management, Personal Development and Interpersonal Relationship Training</u>
Attend a seminar or read a book that deals with effective management, personal development or interpersonal relationships. A list of books and seminars can be found in the attached addendum beginning on page 26.

Optional Course Work:

1. Delivering Customer-Focused Service, LED6W51

This is a web-based course offered through the NCTC (http://training.fws.gov). The course identifies guidelines for customer-focused service, including understanding the role of a professional, the essential skills of communication, and a four-step customer service model. Application workshops are offered throughout the course that afford an opportunity to apply what has been learned.

2. <u>National Uniform Standards of Professional Appraisal Practice</u>, (USPAP), This course is offered by the ASFMRA (<u>www.asfmra.org</u>) as A-12II, by Prosource Education Services (<u>www.prosource.com</u>) as Appraisal 105 and by the Appraisal Institute (<u>www.appraisalinstitute.org</u>). The course will provide an overview of the USPAP, as well as ethics and competency rules and standards and the departure provisions. Examples of proper and improper responses to actual work situations and ethics problems are provided.

3. Advanced Resource Appraisal, A-34

Offered by the ASFMRA (www.asfmra.org), course A-34 is designed to apply previously learned valuation techniques to properties which include mineral rights, water rights and/or timber. The course differentiates between each of these property rights yet identifies similarities whereby the basic valuation processes can be applied. The minerals section contains segments which consistently apply the appraisal theory and procedures to elements such as surface mining (sand, gravel, coal, precious metals, and specialty clays) and drill problems covering situations for underground mining (oil, gas). The water section deals with commercial and recreational applications, split estates and ownership. The timber section will include discussion of pre-merchantable and merchantable timber. Timber, mineral deposits and water rights are uniformly analyzed to demonstrate common valuation processes applicable to otherwise unique and complex properties.

4. Advanced Relocation, NHI # 141030

The course is offered through the Federal Highway Administration (<u>www.fhwa.dot.gov</u>) and is designed for the application of problem solving skills to difficult issues associated with the Uniform Act and implementing regulations. This course is intended to go beyond the basic

functional areas of relocation assistance and concentrate on areas of specific concern.

The course can be found by going to the web site above, then click on "FHWA Programs" on the left side of the page; then under "Planning, Environment and Real Estate Services", click on "Real Estate Services"; then click on "Uniform Act" on the right side of the page; then click on "Uniform Act Training" on the right side of the page near the bottom; then click on "Training Courses"; then click on "Calendar of Events" at the top left side of the page.

5. Conservation Partnerships, OUT8110

Offered through NCTC (http://training.fws.gov), this course focuses on forming and managing partnerships between the Service and other entities with similar goals. The course emphasizes partnerships as voluntary collaborations among entities working toward common, shared objectives.

Practical Experience and Training:

1. Attend the Annual Refuges and Wildlife Project Leaders Meeting

By attending the annual refuges and wildlife project leaders meeting, the employee will meet managers from other states within Region 6 and be given the opportunity to interact with them and see and hear about projects and initiatives in other parts of the region. A more broad sense of regional activities will be gained from listening and interacting with the refuges and wildlife leadership.

- 2. <u>Assist with Complex Regional Acquisition, Exchange or Disposal Project</u>
 Provide significant assistance to higher graded realty specialists to complete a complex assignment within Region 6 or other region as assigned. Assignments of a complex nature will help to broaden the employees knowledge, build confidence and provide for the development of new skills and abilities.
- 3. Act as Team Leader to Prepare Annual AALV Statistics and Recommendations
 Each fiscal year a team from each of the SWAP states assembles and analyzes the number of options signed versus the number of offers made, in an attempt to determine acceptance rates for wetland and grassland easements for the fiscal year. Director's Orders #164 and #170 require Regions 3 and 6 to report acceptance rates as a method to determine under payment or over payment for minimally restrictive easements within the SWAP. As team leader, the employee will be responsible for assembling, analyzing and summarizing the offer versus option information for the state, as well as providing leadership to the team in formulating recommendations for possible change to the program.

4. Detail to the Division of Realty, Washington D.C.

The experience and perspective gained with a 3 to 4 week detail to the Division of Realty, Arlington, Virginia office can provide valuable insight into the issues that are addressed at

that level of the Service. Weekends can provide the opportunity to visit some of the most important historic sites, monuments and museums in the United States.
REALTY SPECIALIST, GS-1170-12
Overview:
At this point of career development, the realty specialist is considered to be at the advanced level. The advanced level realty specialist does not require supervision or assistance to complete assignments, except in the most unusual of circumstances. Work assignments are more complex in

nature and also involve assignments in other states within Region 6. The employee is expert in the

utilization of court house records, preparation of conveyance documents, documents to clear title, and any and all forms used by the Service to acquire interests in real estate. Knowledge, skills and abilities along with formal educational classes and practical work experiences are so broad and varied that the employee is capable of providing training and guidance to all lower graded realty specialists. The employee is capable of acting on behalf of the supervisory realty specialist, providing briefings, oral and written evaluations and recommendations to refuge project leaders, RO staff, Washington office staff and Congressional staffs.

Years of field experience have made the employee extremely knowledgeable in the evaluation and reporting of potential contaminants, as well as the use of biological criteria to evaluate real estate for possible acquisition. The knowledge and understanding of Public Law 91-646 and how the law affects the manner in which the Service acquires interests in real estate is exceptionally good. The employee is an expert in the details of the SWAP and can explain the program in minute detail, including the development of county multipliers and easement chart indices. The overhead and land account budgeting process is very familiar and the employee has the ability to manage both accounts without supervision. The employee is exceptionally knowledgeable regarding the culture of the Service.

Required Course Work:

1. Stepping Up to Leadership, LED 6072

This course is offered through NCTC (http://training.fws.gov). Targeted to aspiring midlevel managers, this course offers individuals the chance to improve their leadership skills through skill assessments, coaching, self-paced and group exercises, and development assignments. A two-week session targeting leadership competencies and a follow-up week after a six-month interim is part of the course. The interim requires a commitment to work on your Individual Development Plan through developmental assignments, coaching, and team project work. Team project presentations occur during the one-week follow-up.

It is expected that the employee will apply for this course a minimum of 3 times after reaching the GS-12 level.

2. Essential Skills of Managing, LED6W48

This is a web-based course offered through the NCTC (http://training.fws.gov) focusing on the participative management style that provides supervisors insight on maintaining employee self-esteem, addressing behavior and listening to motivate. Participants learn skills and principles in building trust, self-respect and dignity which are essential to managing a changing workforce.

3. <u>Management, Personal Development and Interpersonal Relationship Training</u>
Attend a seminar or read a book that deals with effective management, personal development or interpersonal relationships. A list of books and seminars can be found in the attached addendum beginning on page 26.

Optional Course Work:

1. Resolving Complex Environmental Issues, LED5136

Offered by the NCTC (http://training.fws.gov), this course is an in-depth study of the collaborative process for building consensus on environmental issues that are often contentious and that involve multiple stakeholders. Participants learn key collaborative skills and behaviors while stepping through the process model stages. Participants learn and practice these skills through interactive training methods, including case studies of real issues.

2. How to Pass the Minnesota Appraiser Exam

This course is offered by Prosource Educational Services (www.prosource.com) and is designed to solidify the participants understanding of appraisal principles and give test taking tips, tactics and provide sample questions to prepare for successfully passing the appraiser exam. This class is relevant to those taking the appraiser examination in other states.

3. Appraiser Exam

Prepare for and pass the appraiser exam required for state licensing. At this point in career development, the employee will have completed the necessary appraiser educational course work and obtained sufficient practical experience to pass the appraiser exam required for state licensing. It should be understood that the purpose for taking the exam is to measure appraiser competencies. The employee will likely not be able to fulfill the requirements for practical experience to become a state certified general appraiser.

4. Business Relocation, NHI # 141031

The course is offered through the Federal Highway Administration (www.fhwa.dot.gov), and is designed to increase the knowledge of personnel engaged in the relocation of businesses, farms, and non-profit organizations. Topics covered in the course include eligibility for Federal participation, moving payments, advisory services, actual direct loss of tangible personal property, disconnect/reconnect charges, fixed payments and reestablishment expense.

The course can be found by going to the web site above, then click on "FHWA Programs" on the left side of the page; then under "Planning, Environment and Real Estate Services", click on "Real Estate Services"; then click on "Uniform Act" on the right side of the page; then click on "Uniform Act Training" on the right side of the page near the bottom; then click on "Training Courses"; then click on "Calendar of Events" at the top left side of the page.

5. Conservation Partnerships in Practice, OUT8118

Offered by NCTC (http://training.fws.gov), this course is an advanced level conservation partnerships course that builds on the partnership fundamentals learned in the "Conservation Partnerships" course. The training is hands-on experimental training that allows participants a chance to work through their own partnership programs by having open discussions with others about the elements that make a landscape level partnership successful. Training takes place around the nation in locations of successful Service partnerships.

Practical Experience and Training:

1. Accompany Supervisory Realty Specialist on Annual Congressional Office Briefings
Each year the Division of Realty, Region 6 prepares and presents briefings to Congressional
members to inform them of the Services fee and easement acquisition activities within the
state they represent. Specific projects are highlighted involving line item appropriations and
LWCF funding as well as the landscape level projects such as the wetland and grassland
easement programs. The employee will be given the opportunity to participate in the
briefing and answer questions posed by the Congressional member or their staff.

2. Assist in the Preparation of the Annual WAO Overhead Budget

The employee will assist the supervisory realty specialist and realty assistant in the preparation of the annual overhead budget. By reviewing the past years actual categorized overhead expenditures and making a comparison with that years request, the employee will evaluate the need to increase or decrease the overall budget request for that year. Individual staff salaries will be evaluated for annual cost of living increases and in-grade step increases for the year.

3. Attend Realty Supervisors Annual Meeting

Accompany the supervisory realty specialist to the annual realty supervisors meeting. Actively participate in discussions and decisions affecting the Division of Realty, Region 6 RO and WAOs. The experienced gained will broaden the employees understanding of how decisions are made and the affect they have on program focus, funding and staff.

4. Complete a Complex Acquisition, Exchange or Disposal Project

Without assistance, complete a complex project usually performed by Regional office staff. The project may involve a combination of private landowners, other federal agencies, and state and local governments. Land transactions can involve fee or easement acquisition, a land exchange, or a land disposal or any combination of these actions is possible. The practical experience offered by this assignment will provide the employee with a more broad regional perspective and increased confidence.

<u>ADDENDUM</u>

Books:

- 1. First, Break All the Rules by Marcus Buckingham and Curt Coffman
- 2. Business: The Ultimate Resource by Daniel Goleman
- 3. Now Discover Your Strengths by Marcus Buckingham and Donald Clifton

- 4. Communicate with Confidence! By Dianna Booher
- 5. Executive Thinking: The Dream, The Vision, The Mission Achieved by Leslie Kossoff
- 6. *Good to Great* by Jim Collins
- 7. One-minute Manager by Spencer Johnson and Kenneth H. Blanchard
- 8. *Leading Change* by john Kotter
- 9. *Listen Up, Leader* by David Cottrel
- 10. The Leadership Secrets of Santa Claus by Eric Harvey, David Cottrel, and Al Lucia
- 11. The Nature of Success by Mac Anderson
- 12. *The Power of Attitude* by Mac Anderson
- 13. Leadership Courage by David Cottrel and Eric Harvey
- 14. Everything Counts by Gary Ryan Blair
- 15. Five Star Teamwork by Steve Ventura and Michelle Correia Templin
- 16. Walk the Talk Together by Eric Harvey and Alexander Lucia
- 17. 212 ° the Extra Degree by Sam Parker
- 18. 180 Ways to Walk the Leadership Talk by John Baldoni
- 19. Lessons in Loyalty by Lorraine Grubbs
- 20. *Positive Discipline* by Paul Sims and Eric Harvey

Skillpath Seminars:

Seminar dates and locations can be found on-line at www.skillpath.com or at 1-800-873-7545.

- 1. The Essentials of Communication with Diplomacy and Professionalism: 1 day seminar This seminar covers how to handle the toughest questions with finesse and polish, techniques for maintaining your composure when you feel like losing your cool, how to think on your feet in meetings, interviews and impromptu presentations and diplomatic ways to deliver bad news without creating bad feelings.
- 2. *How to Become a Better Communicator*: 1 day seminar Topics covered in this seminar are how you can increase the levels of collaboration

and mutual support among team members, co-workers and managers, how to express your ideas in ways that gain the attention, support and respect of others, how to quickly "fit in" with any group of people and how to make an unforgettable, positive first impression on anyone.

- 3. *Managing Emotions and Thriving Under Pressure*: 1 day seminar

 This seminar will teach participants how to rid your life of unproductive behaviors like procrastination, lack of organization and chronic lateness, how to stop taking setbacks personally and learn to bounce back quickly, how to manage the stress of workplace change by going with the flow, and how to put the power of self-discipline and healthy routines to work in your personal life.
- 4. Coaching and Teambuilding Skills for Managers and Supervisors: 1 day seminar
 The seminar covers how to inspire people to go the extra mile, how to give feedback
 that helps your workers correct shortcomings and do their very best, how to create
 an environment of caring and cooperation and how to deal with difficult workers and
 turn problems into pluses.
- 5. Dealing Effectively with Unacceptable Employee Behavior: 1 day seminar

 This seminar will teach participants how to recognize the 15 warning signs that a
 problem is brewing, how to act, not react, in a negative situation, how to offer
 constructive feedback and how to set measurable performance standards and
 communicate them to your employees.
- 6. How to Excel at Managing and Supervising People: 2 day seminar

 Topics covered in the seminar are how to speak, write and communicate tactfully,
 how to make the skills of today's best supervisors second nature, how to deal
 quickly and professionally with every performance problem and how to give criticism
 in a way that creates positive behavior, not resentment.
- 7. Fundamentals of Successful Project Management: 2 day seminar

 The seminar covers how to manage and work on projects while you are juggling your regular job responsibilities, how to develop your project plan and get it started in the right direction, how to apply the universal 5-stage project management model and how to use 2 types of project reviews to give you early warning of trouble ahead.
- 8. *Managing Multiple Projects, Objectives and Deadlines*: 1 day seminar

 This seminar will teach participants how to reap the benefits of better planning, how to get organized and stay that way, why deadlines get missed, how to keep from missing a deadline and how to make sure your real top priorities don't get lost in the shuffle.

Fred Pryor Seminars:

Seminar dates and times can be found on-line at www.pryor.com or at 1-800-780-8476.

1. *The Art of Working with People*: 1 day seminar

This seminar will cover the people skills essential to building positive and productive relationships by helping the participants understand why different people act the way

they do and handle all personality types with skill and ease, how to communicate confidently, effectively and tactfully with everyone, how to eliminate self-sabotaging behaviors and build your circle of influence and how to address differences diplomatically and quickly negotiate solutions.

2. Speak with Confidence and Clarity: 1 day seminar

This seminar will teach participants the 7 ways to deal with anxiety and nervousness, rehearsal techniques that build confidence and guarantee a smooth delivery, how to anticipate questions and practice responses before your presentation, solid tips to develop clear, interesting presentations that draw listeners, unique openers that get attention and 12 of the most persuasive words in the English language and how to use them effectively in a speech.

3. Dealing with Difficult People: 1 day seminar

Topics covered in the seminar are how to understand the difficult people in your life, know what to do and say, be less of a target for difficult people and how to bring out the best in people.

4. Conflict Management and Confrontational Skills: 1 day seminar

The seminar will teach participants how to uncover hidden resentments and learn what is really bothering you and others, the 3 special situations where you should avoid a confrontation at all costs, steps to take to repair relationships damaged by past conflict, the secret to keeping poise and control when everyone around you loses it, innovative practices that help you get control in the crucial minutes of a crisis and how to set yourself free from antagonists, blamers and complainers.

- 5. How to Deliver Exceptional Customer Service: 1 day seminar
 - Learn how to increase the return on your customer service dollars, make your customers feel important and appreciated, reduce stress and turnover in customer service jobs, become a master in the art of listening and be able to say no without antagonism.
- 6. Managing Multiple Priorities: 1 day seminar

Participants will learn an innovative priority plan that assures that you will get the important things done, realistic and effective ways to defeat procrastination, inventive tactics to keep you confident and make sound decisions under intense pressure and stress, 3 steps that keep others from imposing their priorities on you, and how to deal with changing deadlines smoothly and easily.

7. Getting It All Done: 1 day seminar

The seminar covers how to identify what is important, how to anticipate problems

and prevent bottlenecks, how to spot the hidden shortcuts in every project, how to resolve conflict when other people's goals compete with yours and how to stop procrastinating and

get started and finish your project.