

strategic 2015-2017 plan

RECRUITING • LEADERSHIP • PROFITABILITY • STRATEGY • MANAGEMENT • NEGOTIATING



rebi
Real Estate Business Institute

Message From The Leadership Team

April 2015

It is difficult to trace all of the threads and conversations that led to the creation and development of the new Real Estate Business Institute. Like many ideas, it grew from both a series of informal conversations and formal discussions during meetings. The passionate contributions of many people coalesced to cultivate the connections and intellectual curiosity required to establish the Real Estate Business Institute and this Strategic Plan.

The beauty of strategic planning is that it is generative. This plan was based on the foundation built by the successes of those in the past, an assessment of the current landscape, the introduction of three new credentials, and the perspectives of leadership and other constituents.

The key to a strong, responsive organization is a clearly defined mission, complete with specific goals and intended outcomes. Our strategic goals are essential to our work; they provide a rationale and a frame of reference for the initiatives we launch and they give us a destination and a roadmap for the future. Mission and vision statements are uniquely important for associations and serve as our navigational north star. The following Vision, Mission and Values statements articulate the cornerstones that direct and shape all of the Institute's work.

- The Vision provides the ultimate organizational direction;
- The Mission provides clarity of understanding regarding organizational definition; and
- The Values provide the Institute's unique lens of essential belief.

While each is of equal and unique importance, they provide the clearest direction, understanding and impact when viewed as a whole.

This Strategic Plan builds on our past with anticipation and excitement for the transition to a new name – Real Estate Business Institute (REBI). It is designed to guide our strategic growth while maintaining flexibility to leverage emerging opportunities and the experience and talents of our membership. Through our diverse talents and collective efforts, we will continue our work towards advancing our shared mission and vision.

Thanks to our Work Group, leadership team and staff, this plan proposes strategic opportunities to shape an exciting future for the Real Estate Business Institute.

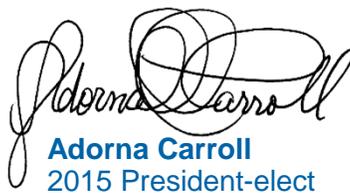
As you continue reading, we invite you to consider how you might contribute to its success.

Best regards,

The 2015 Executive Committee



Bette McTamney
2015 President



Adorna Carroll
2015 President-elect



Michael Bindman
2015 Finance Vice President



Jean Crosby
Immediate Past President



Ginny Shipe
Chief Executive Officer

“Though I do not believe that a plant will spring up where no seed has been, I have great faith in a seed. Convince me that you have a seed there, and I am prepared to expect wonder.”

~ Henry David Thoreau



REAL ESTATE BUSINESS INSTITUTE (REBI)

Strategic Plan

VISION

The Real Estate Business Institute (REBI) is a globally recognized authority that is valued for its expertise in developing and advancing the professional development of real estate professionals.

MISSION

The Real Estate Business Institute (REBI) empowers a diverse community of real estate professionals who manage clients, teams and firms with the knowledge and resources to build and sustain profitable businesses and maximize success.

OUR CORE VALUES

The Real Estate Business Institute's core values are forged by our commitment to the highest ethical standards that drive our priorities, commitments and organizational decisions. Our reputation is the ultimate asset, and these core values guide our behaviors, judgments and how we accomplish our mission:

- **Accountability**
We keep our commitments and make measurable progress to achieve our mission.
- **Collaboration**
We place service before self-interest to promote a spirit of cooperation and collegiality among individuals and organizations with common purpose.
- **Diversity**
We foster and promote diverse membership engagement.
- **Excellence**
We lead through innovation, maximize technology to its fullest and relentlessly increase our knowledge.
- **Inclusiveness**
We operate in a spirit of inclusiveness by providing opportunities for our many stakeholders to be represented and heard across activities throughout the Institute.
- **Integrity**
We demonstrate commitment to high professional standards; value honest communication and productive dialogue. We insist upon effective and ethical leadership practices.
- **Knowledge**
We foster inquiry, reflection, creativity and innovation. We value the exchange of ideas and embrace diverse viewpoints.

- **Professionalism**
We uphold the standards of our profession and contribute to its advancement.
- **Respect**
We recognize the worth, diversity and importance of our peers, colleagues and those with whom we work and serve.
- **Stewardship**
We manage, preserve and responsibly use resources to benefit the membership and the profession.

STRATEGIC OBJECTIVES

MEMBER VALUE AND ORGANIZATIONAL VIABILITY

Goal

REBI continuously seeks opportunities to increase member value through programs and services that effectively meet, anticipate, and exceed their needs.

Supporting Actions

- Create positive member experiences that are customized and responsive to generational preferences.
- Enhance REBI's collective structure to deliver member value at all levels in a cost-effective way.
- Provide support that positions members to adapt to and thrive as changes occur in the industry, in the profession and in their relationship to other professionals.
- Be the conduit of knowledge that advances the profession and is accessible through virtual and physical experiences, including knowledge communities, resource centers, REBI meetings and an integrated Web presence.
- Strengthen and expand the market position of REBI's credentials through ongoing course development and enhancements.
- Value the robust exchange of information and ideas, both among and between our own constituents and with those outside of the consortium with whom we conduct business.
- Further develop, protect and promote the REBI brand and credentials as part of an integrated communication and marketing strategy.
- Evaluate and adopt effective communication methods, including new information technologies.

PROFESSIONAL DEVELOPMENT

Goal REBI will deliver exceptional, relevant lifelong learning opportunities.

Supporting Actions

- Respond to the market for educational opportunities through a multitude of delivery channels for programming, and with competitive pricing.
- Partner, create, develop and provide targeted, industry and practice-specific offerings.
- Further the advancement of real estate education by integrating practical and professional guidance in programming curricula and certification.
- Develop, support and champion REBI credentialing and certification programs.
- Identify emerging trends and keep members informed.
- Capitalize on REBI's storehouse of leadership knowledge and field-relevant experience.
- Develop and implement a plan to strengthen the CRB designation -- REBI's flagship business management program -- and the organization's approach to professional credentialing.
- Support the professional growth of real estate professionals through targeted training opportunities.
- Increase the utilization of REBI products, services, and programs by the professional community.
- Further develop and expand our online Knowledge Center to serve as a central comprehensive and user-friendly repository for knowledge and resources.
- Create professional opportunities that are a catalyst for learning and collaborative experiences.

ORGANIZATIONAL GROWTH AND DIVERSITY

Goal Empower REBI's organizational growth, diversity and excellence by continually determining the value and impact of our strategic priorities.

Supporting Actions

- Develop strategies to launch a more viable and engaged presence in targeted regions outside of the U.S.
- Increase membership to be more global and diverse.
- Leverage communications and technology to engage real estate professionals worldwide.
- Define standards and implement strategies for expansion and organizational development.

ORGANIZATIONAL RESPONSIBILITY

Goal

REBI is a premier member organization where our leadership, volunteers, members and staff collaborate to ensure success.

Supporting Actions

- Foster a strong member-service culture using feedback, research and analytics to support REBI's strategic and operational plans.
- Embrace technological innovations in systematic and efficient manners that support REBI's strategic goals.
- Increase REBI's financial strength through diversified income streams to ensure organizational sustainability.
- Strengthen leadership recruitment, development and training to attract and engage business professionals of the highest caliber and integrity to engage at all levels of the organization.
- Identify and develop leaders for governance continuity.
- Enhance REBI's organizational structure to attract highly competent professionals to advance and contribute to the our strategic initiatives.
- Assess and continuously improve programs, products and services to better serve current members and to attract new members.
- Ensure effective stewardship of the REBI budget.
- Encourage a nimble, responsive, and transparent culture through the behavior of staff, leadership, and membership.
- Proactively adapt to the evolving needs of members and the shifting landscape of real estate.
- Increase organizational recognition and prestige.
- Identify, develop, expand, and diversify financial resources.
- Ensure compliance and transparency with all legal, ethical, and organizational requirements of being a not-for-profit 501(c)(6) organization.
- Increase financial return from products and resources, allowing REBI to invest in additional resources that benefit its members.

MEMBER ENGAGEMENT AND COMMUNITIES

Goal

Facilitate the creation of virtual and face-to-face communities where members engage, connect and build relationships to learn, teach, share, network and mentor in ways that support and enrich their careers, as well as their professional and personal lives.

Supporting Actions

- Expand the REBI community through diversification in terms of demographics, specialization, industry and organizational types.
- Recognize professional excellence through the CRB Hall of Leaders and other awards that celebrate individuals and organizations in the real estate profession.
- Develop new models to recognize and celebrate member contributions.
- Continue to enhance a web presence that engages members and the public.
- Actively engage members in projects, work groups and projects that align with their talents and business experience.
- Increase awareness of the opportunities for members to participate in the execution of our Strategic Plan, consistent with our strategic mission and vision.
- Increase member engagement by identifying and eliminating barriers to participation and through technological innovation.
- Increase the opportunities and enhance the means by which members can interact with the organization and with each other in accordance with their interests.
- Provide an environment in which all members, regardless of location or position, have the opportunity to participate in, contribute to, and benefit from engagement.
- Increase member and staff innovation and experimentation in the creation of new opportunities for face-to-face and virtual engagement.

(Rev. 4/15)

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the essential CREDENTIALS

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