

CoreNet Strategy and Portfolio Planning Community

Community Name	<u>Strategy and Portfolio Planning Community</u>
Community purpose or mission - DRAFT	<p>1. Communicate/Collaborate/Advocate</p> <ul style="list-style-type: none"> a. Identify needs and pressing challenges b. Solidify industry point-of-view and act as spokesperson/lobbyist for domain interests c. Provide a peer-to-peer forum for CoreNet Global (CNG) stakeholders to jointly explore and debate trends and practices. d. Provide networking and career advancement opportunities. e. Provide a point of integration with other complimentary disciplines and CNG communities (IT Community, Alternative Workplace Strategies Community, EDP Portfolio Management Course, etc.) <p>2. Educate/Inform</p> <ul style="list-style-type: none"> a. Help create coherency between CNG Summit content and EDP course curricula b. Educate uniformed CNG members about Strategy and Portfolio Management topic and issues c. Act as Information/Resource repository d. Set baseline – establish foundational skills and identify baseline body of knowledge on subject matter <p>3. Advancement/Exploration/Research</p> <ul style="list-style-type: none"> a. Provide a clearing house to research and understand and research current trends and issues facing Portfolio Managers and Strategists within the CRE community a. Drive research agenda and efforts for important domain related issues/topics b. Create a channel to identify, codify, and share best-practices and tools
How does the community support CNG’s global strategy?	<ul style="list-style-type: none"> 1. Helps to promote CRE management as a strategic activity and professional discipline 2. Provides access to, and coalesces, world-wide leading-edge thinking on an emerging discipline that is important to effective CRE management and leads – at a greater level than most other CRE disciplines – to bottom-line impact 3. Will enhance the skills and body of knowledge available to CNG members 4. Will encourage rigor, and sound techniques and procedures within the CRE discipline 5. Enable members to network, exchange ideas, solve

	<p>problems, and gain access to expertise and innovative strategies</p> <ol style="list-style-type: none"> 6. Support CNG competency model in terms of identifying skills, training, and academic resources 7. Integrate with EDP courses to distribute Community content and thinking
<p>Community leader(s) (List leaders identified)</p>	<ol style="list-style-type: none"> 1. Ongoing <ol style="list-style-type: none"> a. Sven Pole – CB Richard Ellis, Inc. 2. Launch/Start-up Team <ol style="list-style-type: none"> a. Web Enablement – Mark Golan, Matt Werner, Gagandeep Singh b. Roundtable/Forum – Larry Wolfert, Joan Price c. Governance – Organization and Intellectual Property (“IP”) content – Paul Garity, Marty O’mara d. Liaison to other Communities - Gary Miciunas, Larry Wolfert and Joan Price e. Charter/Board Liaison – Sven Pole, Barry Varcoe
<p>Type of Community (Select one)</p>	<p>Topic (Specify): Practice – <u>CRE Strategy and Portfolio Planning</u></p>
<p>Description of the members that will participate?</p>	<ol style="list-style-type: none"> 1. Community will support three levels of involvement (see organizational diagram) <ol style="list-style-type: none"> a. <i>All CoreNet members via web – drive toward open source treatment of content that is not identified as private IP – open to all</i> b. <i>Community members/participants in facilitated discussions or research tracks – open to those that help improve content or level of discussion</i> c. <i>Private discussion/research efforts where members elect to sequester themselves – self policing and self selecting groups that elect to take deliberations offline to protect IP or confidential information</i> 2. Primary participants <ol style="list-style-type: none"> a. End-user practitioners b. Service provider practitioners c. Consultant – subject matter experts 3. Secondary participants – Other aligned communities/disciplines <ol style="list-style-type: none"> a. IT software community b. Design c. Workplace strategies d. Transactions/brokerage e. Finance

<p>How will the community operate globally?</p>	<p>f. Strategic planning</p> <ol style="list-style-type: none"> 1. Organization (see organizational diagram) <ol style="list-style-type: none"> a. Community Operating Board – Set governance and research agendas - prefer at least one from Europe and one from Asia <ol style="list-style-type: none"> 1. Start-up Board Committees <ol style="list-style-type: none"> (1) <i>Web Enablement</i> (2) <i>Roundtable/Forum</i> (3) <i>Governance – Organization and Intellectual Property (“IP”) content</i> (4) <i>Liaison to other Communities</i> 2. Board Research Projects (TBD) - Volunteers assigned to research specific topics identified as of current interest b. Community Invited Membership – Discussion forums at CNG Summits. Invitations based on interest, participation, and expertise. c. CNG Worldwide Membership – Web-Based community of information sharing, networking, and best practice exchanges. 2. Meetings <ol style="list-style-type: none"> a. Board to meet quarterly, and in-person at Summits b. Fall and Spring summit – roundtable events for Community Invited Membership c. Ad hoc meetings/calls for research efforts and Board Committees as appropriate
<p><i>Governance</i></p>	<ol style="list-style-type: none"> 1) Organization <ol style="list-style-type: none"> a) Community Operating Board Members will rotate every two years – with one half rotating each year to ensure ongoing coverage and continuity b) One member of CoreNet Global Staff will sit on Operating Board c) Board Committees appointed by Board and progress monitored by Board 2) Content and Intellectual Property <ol style="list-style-type: none"> a) Adjudicate whether content is public or private intellectual property b) Review quality of content – develop self-policing concepts to web enabled media (“wikipedia” style) c) Administrate content and treatment of intellectual property across spectrum of community – from open forum to confidential private working groups
<p>How many members are likely to participate in the first year?</p>	<p>Board Meetings: 7 – 12 Members</p> <p>Invited Discussion Forums:</p>

	<p>2009 Spring Summit – 40-60 participants 2009 Fall Summit – 60 – 80 participants</p> <p>Web Community – Open to all</p>
Support needs from CoreNet Global	<ol style="list-style-type: none"> 1. Visible support on summit programs, web site, and throughout membership base 2. Web portal/site/blog to capture information and support knowledge sharing 3. Logistics support for summit roundtables 4. Guidance and occasional manpower for codifying research or content
CORENET Staff lead assigned	<p>Gayle E. Crew Manager, Program Development Telephone: 404-589-3207 Mobile: 404-786-5967</p> <p>Amanda Brooks Director Program Ideation and Development Telephone: 404-589-3252 Mobile: 678-469-7257</p>
Board liaison	<ol style="list-style-type: none"> 1. Strategy and Portfolio Planning Community expects to have a direct connection with at least one member of the board (Barry Varcoe and/or Mark Golan?) to provide guidance and support

For additional information, contact:

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