



SPRING CONFERENCE 2026

Fairmont Princess - Scottsdale
March 17-18

Session code: IMC0318



INFORMATION MANAGEMENT COMMITTEE LEADERSHIP



Jason Robisch,
SitusAMC | Chair



Robb Fitzsimmons,
Heitman | Vice Chair



Marlyn Ramirez, UBS
| Vice Chair



Lauren Stokes,
Nuveen | Vice Chair



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AGENDA

- Mission Statement
- Hot Topics
- Technology Symposium
- New NCREIF Data Submission Process
 - Tips, Tricks and Technology

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MISSION STATEMENT

The mission of the NCREIF Information Management Committee is to provide leadership and guidance in the administration and use of real estate investment information to improve decision-making through:

1. Education
2. Effective data management and governance
3. Recommendation on standards for data elements
4. Collaboration with other NCREIF committees

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HOT TOPICS

CURRENT TOPICS

- **Data Submission and Aggregation: Challenges with multiple sources and data conversions**
 - Key pain points and red flags from past projects
- **Culture & Silos: Oversight perceived as bureaucracies/friction between IT/Accounting systems and Accounting Teams**
 - Impact on collaboration and efficiency
- **System Implementations: Who leads accounting system implementations/projects?**
 - Governance and accountability structure
 - Lessons Learned and critical insights from previous implementations; risks to anticipate and avoid
 - GL/TB workflow case study
- **AI**
 - Dispelling AI myths
 - What else to think about for AI
 - Use case specific?
 - Quantity of data sets
 - What is needed
 - How does AI actually work?
 - Legal implications

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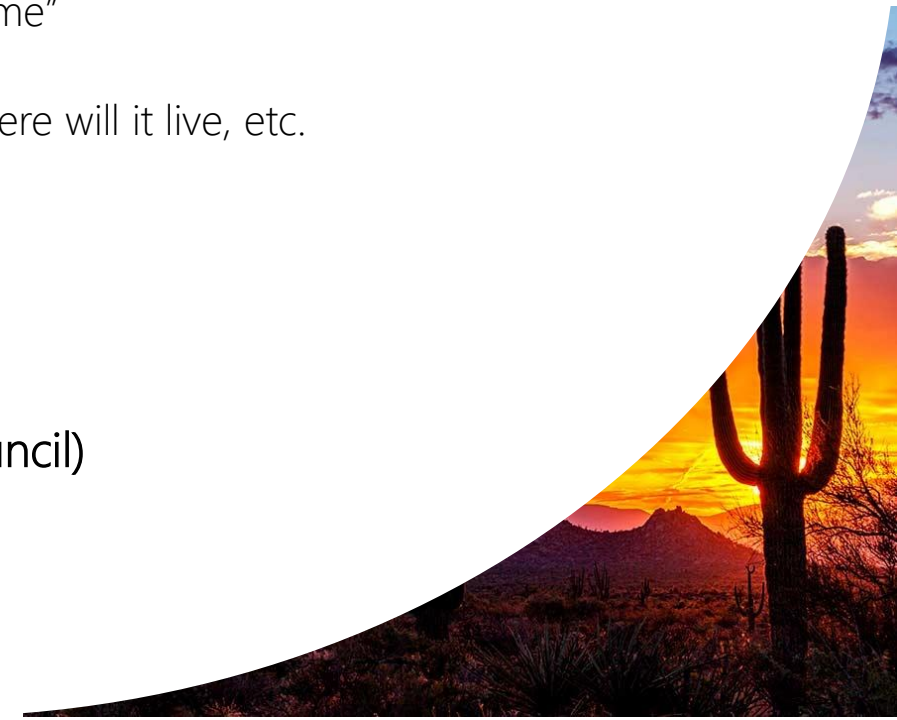


HOT TOPICS

CURRENT TOPICS

- **Data Lake**
 - Leveraging for AI use cases
 - What elements go into it
 - What is in there for reporting, what isn't?
- **Challenges in growing technology**
 - Disruptive Technology
 - Trying to keep up
 - Getting people to adapt to new technology – “I do it in Excel and it works for me”
- **Ask the question “Why don’t we have solutions”**
 - Discuss reasons why, what can we do, how do we get the data we want and where will it live, etc.
- **Use cases for data management tools – RPA**
 - What works / what doesn't
 - Issues around simulating user – passing username/password
- **What technology is available to help create reporting or dashboards**
- **How can we use technology to share data**
- **Asset and Investment Best Practices perspective (Reporting Standards Council)**

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HOT TOPICS COVERED TOPICS

- Wrapping up COA standardization discussion – Fall 2025 Conference
 - CURRENT UPDATES (Spring 2026 Conference)
 - OSCRE conducted multiple roundtables in major cities; most recent in Toronto to refine scope
 - Universal COA selected as the pilot use case for the OSCRE Data Infrastructure initiative
 - Firm commitment threshold: 10 required, 7 confirmed
 - Full scoping and focus groups to begin April 2026
 - Upcoming roundtables: NYC (June), UK (September)
 - Scope includes UK, Europe, and Asia
 - Includes a pilot project for implementing new data modelling techniques
 - Will continue to communicate progress – will include invitations to discussions so you can follow what's happening.
 - If you and your team would like to know how this might impact you (both COA and Data Infrastructure)

contact Marlyn.Ramirez@Vistra.com or Ian.Cameron@oscre.org

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HOT TOPICS COVERED TOPICS

- Asset Onboarding and Investment Structure Standardization – Fall 2025 Conference
- Data Governance and Workflow
 - Developing and Maintaining a Chart of Accounts – Fall 2024 Conference
 - Workflow Case Study through the lens of the valuation process – Fall 2024 Conference
- AI
 - Is AI About to Unleash an Incoming Storm of Innovation & Efficiency in Real Estate? – November 2023 Conference
- Solutions Expo related
 - Going through a Lift-Out retrospective – April 2023 Conference
- Session that “dumbs down” tech – November 2022 Conference
 - Ex, what is API, ETL, understanding the basics
- Revisit the “Build It or Buy It” panel – November 2022 Conference

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“Data Flow”— Covering the full journey from data collection to processing, delivery, and practical use.



NCREIF
TECHNOLOGY
SYMPOSIUM
FALL 2026

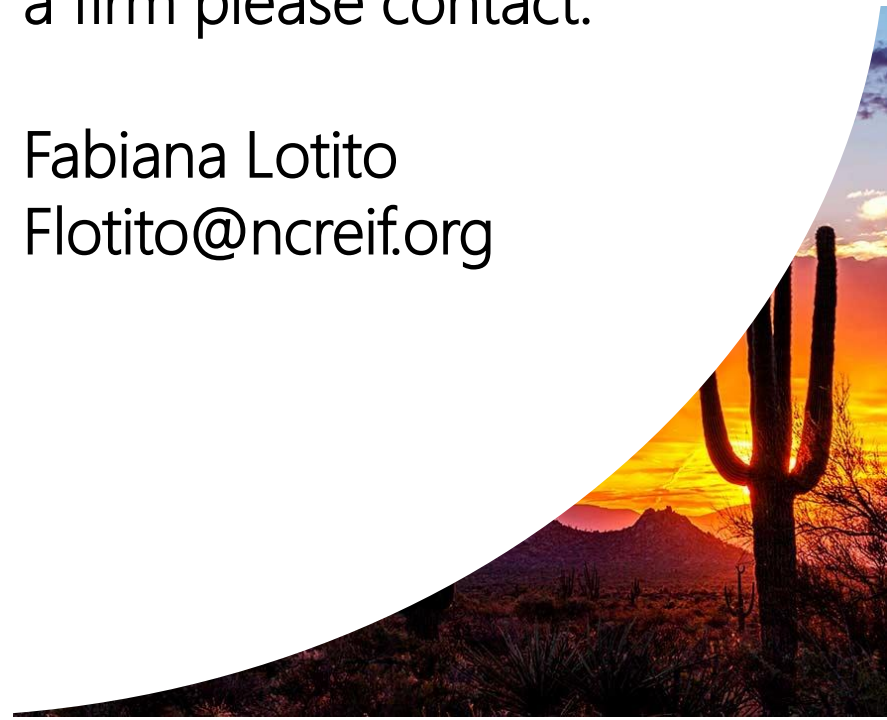
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Committed Firms

- Alter Domus
- Cambio
- Income Analytics Ltd.
- Vistra
- Yardi

For an invite or to recommend a firm please contact:

Fabiana Lotito
Flotito@ncreif.org



NEW DATA SUBMISSION PANEL



Lauren Stokes,
Nuveen | Moderator



Jeannie Olson,
NCREIF



Benay Kirk,
Alter Domus



Adam Vanni,
Fairfield Residential



Dan Waehner,
Heitman



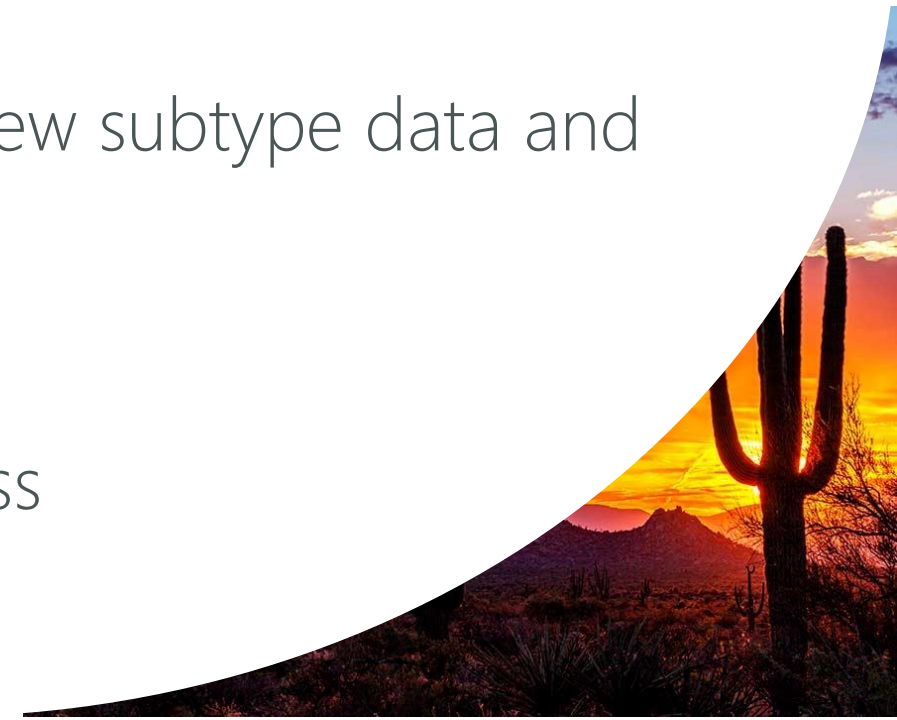
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Technology Upgrades at NCREIF Submission System

Why a New Submission System?

- Short answer: The current system is 15 years old.
 - Not easily scalable
 - Separate collections for data points like new subtype data and valuation metrics
 - Outdated technology and architecture
 - Slow and unreliable processing times
 - Validation done outside of the upload process

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Technology Upgrades at NCREIF Submission System



A modernized user interface and enhanced user experience



Improved system performance and overall stability



A modern, cloud-based application with improved scalability, reliability, and performance



A modular architecture that allows for easier updates, future expansion, and third-party integrations



Enhanced data governance and compliance features to maintain trust and integrity in your data.



Re-architected our data model and implemented a data lake strategy, significantly expanding our long-term capabilities for advanced analytics and data distribution

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THANK YOU

Questions?

