

AN INTRODUCTION TO  
**ORTIS**

# A FIRM FOUNDATION

## ORTIS' vision, mission & guiding principles

ORTIS evolved out of regional initiatives being pursued by two distinct neighbouring groups in early 2014. CoreLogic, the provider of the Matrix system, served as the catalyst in our thinking and structure. They encouraged the move to one regional system. With a supplier-driven deadline of early 2015, the founding boards — Brantford, Cambridge, Guelph, Hamilton-Burlington, Kitchener-Waterloo, Niagara, Oakville-Milton and Simcoe — began to meet on a regular basis to begin to realize the benefits of one regional system.

What differentiates ORTIS from other regional systems are our mission, vision and values, and from that foundation, the governance structure that naturally flows from it. We are proud of it. We are not interested in providing services to any associations but rather want to welcome them to the ORTIS family.

### VISION

ORTIS has been created with a strong, and cohesive sense of why we exist, and how we can continue to benefit our members and their users.

- ORTIS will be the preferred MLS® System & Technology provider for real estate boards and associations
- REALTORS® will have the best tools and technology enabling them to provide superior solutions to their clients
- Clients will value and choose REALTORS® that belong to an ORTIS Association

### MISSION

As a not-for-profit driven by technology, our mission at ORTIS is quite simply to:

- Provide access to manage an MLS® and supporting technologies

### GUIDING PRINCIPLES

Were created to set a framework for our decision-making, collaboration, cooperation and all its possibilities.

# A FIRM FOUNDATION

guiding principles

- 1. ALL ORTIS MEMBERS WILL BE VIEWED, AND TREATED, AS EQUALS**
- 2. ORTIS WILL BE FISCALLY EFFICIENT AND RESPONSIBLE**
- 3. ORTIS WILL BE NIMBLE AND BECOME NO LARGER THAN REQUIRED TO SERVE ITS MEMBERS' NEEDS**
- 4. ORTIS WILL MODEL AND PROMOTE OPEN DIALOGUE, RESPECT AND TRUST WITH AND AMONGST ITS MEMBERS**
- 5. ORTIS WILL BE OPEN, TRANSPARENT AND CLEAR WHEN COMMUNICATING WITH ITS MEMBERS**
- 6. ORTIS WILL BE INCLUSIVE AND CONSULTATIVE IN ITS EVIDENCED-BASED DECISION-MAKING**
- 7. ORTIS WILL FOSTER COOPERATION AMONGST ALL STAKEHOLDERS**
- 8. ORTIS WILL APPLY BEST PRACTICES AND PRINCIPLES OF CONTINUOUS IMPROVEMENT IN ITS GOVERNANCE AND OPERATIONS**

# THE 15 BENEFITS

## of the ORTIS Regional System

### 1. SIGNIFICANT SAVINGS FOR USERS

Arising from the elimination of multiple board membership and Inter-board listings

### 2. ECONOMIES OF SCALE

Arising from the negotiating power of a large — now over 7,000 users with no limit to our potential growth (and further economies of scale)

### 3. ECONOMIES OF SCOPE

Ability to access best-of-breed technology almost always unavailable to smaller individual boards and the resources to continue accessing these technologies. Vendors are very receptive to working with ORTIS because it represents a growing number of boards and a large number of users which translates into ease of integration of services and products

### 4. REALTORS® IMAGE IMPROVED WITH COMPLETE INFORMATION

Rather than a fragmented and incomplete slice of market information, ORTIS users benefit from access to all regional market information: Sellers benefit from the exposure of their listings throughout the region. Buyers have easy access to an expanded inventory. Armed with the latest data, our REALTOR® users can offer the highest level of service and knowledge to their buyers and sellers — and, in the process, reflect positively on their own reputation and that of the profession as a whole

### 5. DATA INTEGRITY

Under a regional umbrella, a high level of data integrity has been created and is now maintained. With the eyes and ears of our members, as well as the collective experience of our staff, we have now set, and value, a common, and by definition, a higher level of data integrity

# THE 15 BENEFITS

## of the ORTIS Regional System

### **6. STATISTICS ARE ACCURATE AND ALL-ENCOMPASSING**

Overlapping areas are now contained in a single database which enables our users to provide the complete picture to their clients

### **7. MEMBERS NEED TO LEARN ONLY ONE SYSTEM**

Rather than negotiate the vagaries of multiple systems, users can now navigate a single system. And, while our service provider CoreLogic is a U.S. firm, Matrix is Canadian technology developed by Tarasoft, which was acquired by CoreLogic several years ago and is supported by a team in Nelson, British Columbia

### **8. SPEEDY RESOLUTION OF TECHNICAL ISSUES**

CoreLogic has been extremely responsive and cooperative, working closely with staff first on the conversion process and on fine tuning Matrix to meet our needs and wants. The IT Manager of a member Board acts as the liaison with CoreLogic and is in regular communication with programmer and database administrators. Our Task Force participates in weekly conference call with the CoreLogic programmer ensuring the continuing development of our Matrix system

### **9. STATE-OF-THE-ART SECURITY**

In an excellent working relationship, ORTIS is working closely with Clarity to implement and monitor a remediation process that prevents any unauthorized access

### **10. STANDARD FORMS, MLS® RULES & POLICIES**

Gone are the challenges of crossing a small road and suddenly operating in a totally new set of rules with their minor differences risking our members looking incompetent. The founding members of ORTIS went through a painstaking process of parsing down a discombobulated jumble of forms, rules and policies into a comprehensive set of forms that we could all live with, and indeed, thrive with. Both CoreLogic and ORTIS realize that new partners will bring with them new forms and data fields. The foundational system has been built with flexibility in mind to welcome the requirements of new partners while still maintaining the data integrity and ease of use that come with a regional system

# THE 15 BENEFITS

## of the ORTIS Regional System

### 11. TRAINING

Comprehensive training of staff and members. ORTIS successfully trained members and staff of all Boards, and our own efforts were supplemented by a CoreLogic staff who travel from Board to Board. As an example of sharing and solidarity, some ORTIS boards have provided train-the-trainer to other ORTIS Boards (at a fee) and continues to provide these services on an invitation basis to any Partner who feels they would benefit

### 12. ASSOCIATIONS JOINING ORTIS

Jump on a system that is already fully-functioning, which results in significant savings of time, energy and resources. You will not have to reinvent the wheel because the system, functionality and training have already been developed through the shared resources of the ORTIS partners

### 13. COLLABORATION LEADS TO BEST PRACTICES

Although originally not anticipated, the collaboration of the partner boards have given them the ability to share knowledge, expertise and resources far beyond our original mandate or even our vision, all while preserving the uniqueness of each member Board

### 14. CONTINUOUS IMPROVEMENT ARRIVED THROUGH CONSENSUS

Decisions related to MLS® Data, forms, schema, formats, functionality are arrived at through the collaboration of partnering Associations. All are open to customization, on the understanding that any change that is made must be made to ORTIS, as a whole (rather than limited to one community, for example). All have a voice and provide feedback in the evolving Matrix system. We have tried and proven mechanisms in place to integrate input from all our Members, and continuously improve our system

### 15. MOBILE APP

ORTIS provides a robust mobile app that leverages the location-based features of a smart phone with the robustness of the MLS® System. This is an optional service, where each Board can assess if this would be of benefit to their users. This is one of many potential enhancements that are made possible through the strength of our numbers

# INCLUSIVE, EFFICIENT

## decision-making and governance

ORTIS is currently governed by eight directors, with no more than one from any member board. The ORTIS Board of Directors is not a representational Board, which means that the Directors who serve on ORTIS are there to serve all of the Member Boards, rather than their own Board. Elections are held at the AGM in August/September.

ORTIS anticipates adapting the number of seats at the Board table as new associations join, while also holding onto the principle that Directors are there to serve ORTIS, as a whole, rather than their own Board or region. New Boards may have an opportunity to nominate their representation to the Board or Directors once they are members in good standing with fees paid in full, and fully operational on the ORTIS system.

As a Member of ORTIS you would have the opportunity to participate in various committees, task forces and meetings as an equal partner. We invite each partner to have a voice. Also open to adaptation, currently these working groups include: Chief Executive Officer Group (CEOG), Finance, By-law & Governance, Technology, Nominations, Communications, MLS® Rules and the Forms Committee.

# MEMBER BOARDS

## retain ownership of data

ORTIS supports Member Boards owning and being in control of their own data. ORTIS will require a license from each Member Board and an MLS® Services Agreement, which enables aggregation into one central system and access to the data for all our users. The MLS® system data cannot be segregated. It has always been envisioned as a fully regional system and has been built accordingly. The MLS® Services Agreement will define the appropriate terms of use of ORTIS for each Member Board, as well as termination process should any one Board choose to leave.

# ORTIS IS OPEN FOR BUSINESS

what are the requirements for membership?

1. ADOPTION OF CLAREITY SAFE ACCESS SECURITY
2. ADOPT REGIONAL MLS® RULES
3. COMPLY WITH THE ORTIS BYLAWS
4. SIGN THE MLS® SERVICES AGREEMENT
5. PAY THE MEMBERSHIP INITIATION FEE AND A CORELOGIC CONVERSION COST
6. PAYMENT OF THE ANNUAL MEMBERSHIP INITIATION FEE
7. HARD CUTOVER TO MATRIX IN CONTRACT-NEGOTIATED TIME

## the ORTIS difference

ORTIS has been created and continues to deliver services through a willingness to be part of a greater whole. We believe that REALTORS® across the province have the same needs. By working together, ORTIS can continue to provide exceptional technology solutions to all our users in a cost-effective, collaborative manner. That collaboration has again shown us that the “we” is smarter than the “me”.