

# WELCOME

## 2022 CEO-MC RETREAT



Insightful learning  
for community association  
management executives

La Quinta Resort | La Quinta, Calif.



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# 2022 CEO-MC RETREAT

## Program Schedule at a Glance

### WEDNESDAY, OCTOBER 12

**2–5 p.m.**

Registration  
Flores Foyer

**5–7 p.m.**

Welcome Reception  
Great Lawn and Waterfall

### THURSDAY, OCTOBER 13

**7:30 a.m.–4 p.m.**

Registration  
Flores Foyer

**7:30–8:45 a.m.**

Breakfast served in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**9 a.m.–Noon**

**OPENING GENERAL SESSION**  
Flores Ballroom 1–4

**10:30–11 a.m.**

Break & Networking in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**Noon–1 p.m.**

Lunch served in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**1–4 p.m.**

**BUSINESS BUILDING WORKSHOP**  
Flores Ballroom 1–4

**2:45–3:15 p.m.**

Break & Networking in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**4 p.m.**

Adjourn for the day—Time for FUN  
after-hours sponsor activities!

### FRIDAY, OCTOBER 14

**7:30 a.m.–4 p.m.**

Registration  
Flores Foyer

**7:30–8:45 a.m.**

Breakfast served in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**9–10:30 a.m.**

**GENERAL SESSION**  
Flores Ballroom 1–4

**10:30–10:45 a.m.**

Break & Networking in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**10:45 a.m.–Noon**

**BREAKOUT SESSIONS**  
Flores Ballroom 1–4  
Diego Ballroom  
Las Brisas Ballroom

**Noon–1 p.m.**

Lunch served in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**1–2:15 p.m.**

Repeat Breakout Sessions

**2:15–2:30 p.m.**

Break & Networking in the  
CEO Connection Lounge  
Flores Ballroom 5–8

**2:30–4 p.m.**

Large Group Facilitated Discussion  
with Happy Hour  
Flores Ballroom 1–4

**4 p.m.**

Adjourn for the day—Time for FUN  
after-hours sponsor activities!

### SATURDAY, OCTOBER 15

**8–10 a.m.**

Breakfast & Networking  
Flores Ballroom 1–4

**10 a.m.**

Retreat Adjourns

# 2022 CEO-MC RETREAT

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# FULL PROGRAM

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THE CEO-MC RETREAT PLANNING COMMITTEE WELCOMES YOU!



**CHAIR**  
**Lisa Dennis, CMCA, AMS**  
Magnolia Property  
Management  
Katy, TX



**PAST CHAIR**  
**Laura Hall, CMCA**  
Community Management, Inc.  
AAMC  
Portland, OR



**Elizabeth Caswell Dyer, CMCA**  
Sopra Communities, Inc.,  
Denver, CO



**Rolf Crocker, AMS**  
Omni Community  
Management, LLC  
Fair Oaks, CA



**Ben Rhodes, CMCA, AMS, PCAM**  
Community Association  
Management Services, AAMC  
Charlotte, NC



**Sharika Tucci, CMCA, AMS, PCAM**  
Masterkey Management Ltd.  
Bermuda



CAI Community Association  
Managers Council 2022 Liaison  
**Robin Thomas, CMCA, AMS, PCAM**  
Ancor Property  
Professionals, Inc.  
Scottsdale, AZ

## Wed., Oct. 12

**2-5 p.m.**

**Registration**

**5-7 p.m.**

**Welcome Reception**

Come share your knowledge and gain insights with leading community association management executives at the popular Welcome Reception. This also is your first opportunity to network with peers and engage with the event's sponsors.

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# Insightful learning for community association management executives

## Thurs., Oct. 13

**7:30 a.m.–4 p.m.**

**Registration**

**7:30–8:45 a.m.**

**Breakfast**

**9 a.m.–Noon**

**Welcome and Opening General Session: 2022 Check-In: Tracking Changes in Community Associations—Condominium Safety, Fannie Mae and Freddie Mac Guidelines, Manager Well-being, DEI, and More**

Every year brings change to the community association housing model, but 2022 has brought a remarkable number of transformations. During this session, CAI leaders review significant changes influencing your community association management firm, your employees, and your clients.

Join CAI's Thomas M. Skiba, CAE, chief executive officer, Dawn M. Bauman, CAE, senior vice president, government and public affairs, and Jessica Towles, president of the Board of Trustees, for an engaging dialogue. Hear about new federal and state legislation and CAI initiatives following the condominium collapse in June 2021 at Champlain Towers South in Surfside, Fla., and examine how new Fannie Mae and Freddie Mac lending questionnaires are affecting condominium communities. The tragic shooting death of a community association manager in August has board members and managers rethinking operations and doing more to address mediation, mental health, and community safety. Diversity, equity, and inclusion aren't just buzzwords. We'll discuss how inclusion has never been more important and why building a workplace of belonging is good for your business.

These topics and more will help you sharpen your analytical skills and give you the right tools to prepare for what's to come. Knowing the past, understanding the present, and looking to the future will help you make the right decisions for your company and your clients.

**Dawn Bauman, CAE, Senior Vice President, Government & Public Affairs, CAI**

**Thomas M. Skiba, CAE, Chief Executive Officer, CAI**

**Jessica Towles, CMCA, AMS, PCAM, President, CAI Board of Trustees**



# 2022 CEO-MC RETREAT

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# FULL PROGRAM

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Noon–1 p.m.

Lunch and Networking in Sponsor Lounge

1–4 p.m.

**NEW Business Building Workshop: Take Your Business to the Top**

Are you struggling to manage the constant changes in our industry? Is it hard to find and retain top talent? Is the current economic outlook freaking you out?

**Richard Palmer-Smith** hosts a business-building workshop with proven solutions to help with all these top-of-mind issues and more. At this interactive workshop, you'll walk away with your own workbook filled with tools that are instantly implementable into your business, the opportunity to mindshare and build off each other's perspectives, an understanding of how to build your business for both growth and control, strategies for driving accountability throughout your organization, tools to align your team on your company's biggest priorities, and much more.

Get a jumpstart on the tools and perspectives that will be covered and learn more by reading *Pinnacle: 5 Principles for Taking Your Business to the Top of the Mountain*



**Richard Palmer-Smith, Boulder, Colo.** | *Richard has owned his own company since the age of 16. At 19, he moved to Boulder, Colo., to attend the University of Colorado and started a construction company in 1993 to pay for tuition and living expenses. Learning from his experiences and mistakes, he began consulting with business owners and C-suite leaders to help them avoid the same mistakes. Since then, he has helped 500+ business leaders create healthy and functional teams within their companies and drive big profits. Richard became a founding member of Pinnacle Business Guides in 2021 and is committed to helping guide his clients through the common pitfalls that come along with the journey to the top.*

4 p.m.

Adjourn for the Day

# Insightful learning for community association management executives

## Fri., Oct. 14

**7:30 a.m.–4 p.m.**

**Registration**

**7:30–8:45 a.m.**

**Breakfast**

**9–10:30 a.m.**

**Welcome Announcements and General Session with Anthony Huey:  
Are You Ready? Don't Let 30 Years of Hard Work Get Destroyed  
in 30 Seconds**

Somewhere within every management company, a crisis could be waiting to happen—maybe tomorrow, maybe next year, or even in five years. You can't be sure what the crisis will be or when it will strike, but you can be sure that a crisis will put your organization's hard-earned image and reputation up for grabs. The old adage, "Perception is reality," has never been more true than in today's superficial, hyper-critical, and social media-driven world. This timely and highly entertaining presentation offers actionable keys to swaying internal and external perception during a negative event. You'll learn how to arm yourself with a reputation-saving crisis response framework, gain 10 battle-proven tips to survive any crisis and live another day, discover how to control social media when things get tough, buy your team time when the hard questions get asked, overcome the biggest mistake companies make in a crisis, and more.



***Learning Keys:***

- Arm yourself with a reputation-saving crisis response framework.
- Gain 10 battle-proven tips to survive any crisis and live another day.
- Discover how to control social media when things get tough.
- Buy your team time when the hard questions get asked.
- Overcome the biggest mistake companies make in a crisis.
- Learn how to easily "plug the holes" in your current crisis plan.
- Understand how to win in the court of public opinion.

# 2022 CEO-MC RETREAT

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# FULL PROGRAM

10:45 a.m.–Noon

## CONCURRENT BREAKOUT SESSIONS

### A Case Study in Manager Burnout: Recognizing and Constructively Responding to Employee Mental Health

Las Brisas

Community association management selects high performers who can lead, get things done, and solve problems. They often work themselves so hard they burn out, are forced to take medical leave, quit their jobs, and even contemplate suicide. These high performers often are diagnosed with a medical condition known as high-performing depression. This critical human issue of mental wellness is made worse by the pandemic, more difficult customers than ever, the great resignation, and the looming recession. Listen to a first-hand account of a community association manager, learn how to spot and manage the issues, and get the information you need to develop wellness programs to help your company, community association, and employees.

**Bill Overton, PCAM, DRM**—Palm Desert, Palm Desert, Calif. | *Bill is a 35-year community association management professional, has worked as an association management company leader and consultant, and eventually matriculated into high-end master-planned community management. He recently retired after 25 years serving on the CAI faculty. A contributing editor for Common Ground magazine for more than 20 years, Bill also served on the CAI South Arizona Chapter and CAI Board of Directors. A writer, educator, and national conference speaker, Bill is a three-time CAI award winner—Author of the Year (1998), Educator of the Year (1997), and Outstanding Volunteer Service (2006).*

### Automation & Outsourcing: Solve Staffing Issues While Achieving Greater Profits

Diego

The key to maximizing your profits is finding the most efficient way to accomplish your scope of work with communities. This session will cover how to use automation and outsourcing to not only cut down on the cost needed to deliver your service but also how to need less staff. Presenters will walk through what needs to be in place for your company to be successful, which areas should be automated and outsourced first, and provide tools to help you get started or add to your current efforts. The most profitable companies have already implemented what will be shared in this session. Don't get left behind!

**Adam Balkcom**, *AssociationPrime* powered by SouthState Bank & CAM Leadership Institute, Atlanta, Georgia

**Ben Rhodes, CMCA, AMS, PCAM, CAMS**, Charlotte, N.C.

**Rob Buffington, CMCA**, Gordian Staffing, Elkhorn, Neb.



# Insightful learning for community association management executives

## Applying Business Building Tools to Community Association Management: Real World Examples

### Flores Ballroom 1-4

During this panel session, hear from Scott Wolf and Ben Currin about their experiences implementing the tools discussed during Thursday's keynote session with Richard Palmer-Smith. Take a deep dive into understanding their unique journeys, the challenges each has faced, and how implementing these practical concepts has impacted their individual businesses. Lastly, discuss tips and pointers that are unique to community association management and what to pay attention to as you implement these tools and concepts into your business.

**Gordon Caudle**, *Pinnacle Business Guide, Durham, N.C.*

**Ben Currin**, *Vantaca LLC, Wilmington, N.C.*

**Scott Wolf**, *CMCA, AMS, PCAM, Brigs, Boston*

### Noon-1 p.m.

**Lunch and Networking inside CEO Lounge**

### 1-2:15 p.m.

**Repeat the CONCURRENT BREAKOUT SESSIONS**

### 2:15-2:30 p.m.

**Break & Networking**

### 2:30-4 p.m.

**Large Group Facilitated Discussions with Happy Hour**

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### 4 p.m.

**Adjourn for the Day**

## Sat., Oct. 15

### 8-10 a.m.

**Breakfast & Networking**

### 10 a.m.

**Retreat Adjourn**

# GENERAL INFORMATION

## Accommodations

### Headquarter Hotel

La Quinta Resort & Club  
49499 Eisenhower Drive  
La Quinta, CA 92253  
(760) 564-4111

## Emergency Procedures

Please take a few minutes to familiarize yourself with the locations of the emergency exits in the hotel. A detailed emergency exit map is located on the inside of your hotel room door. In the event of a fire, do not use the elevators. In any emergency, please dial 0 to inform the hotel operator. To reach a CAI staff member during hours when the registration desk is not open, call Holly Carson at (703) 598-7938.

## Smoking Policy

The conference center is smoke-free. Smoking is limited to designated outside areas.

## Front Desk/Lost and Found

Please contact hotel housekeeping for any of your needs by dialing 0 from your room or any of the house phones to speak to a hotel operator.

## What to Wear

The CEO-MC Retreat attire is business casual.

## Registration Desk

### Flores Foyer

Wednesday	2–5 p.m.
Thursday	7:30 a.m.–4 p.m.
Friday	7:30 a.m.–4 p.m.
Saturday	8 a.m.–10 a.m.

## Wi-Fi

Access the wireless internet network from within the conference space at La Quinta Resort.

SSID: GordianStaffing

Password: GordianStaffing

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STAFFING

## Charging Lounge

### Flores Foyer

Thursday 7:30 a.m.–4 p.m.

Friday 7:30 a.m.–4 p.m.

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## CEO Connection Lounge

### Flores Ballroom 5–8

Thursday 7:30 a.m.–4 p.m.

Friday 7:30 a.m.–4 p.m.

*Lunch will be served from noon to 1 p.m. on Thursday and Friday.*

Grab a bite to eat and continue making new industry connections in the brand-new CEO Connection Lounge. This popular sponsorship experience enables you to mingle with long-time partners as well as new companies, all of whom are offering innovative products and services. See a floorplan and complete listing of participating partners on page 14.

# GENERAL INFORMATION

## Policies

**CANCELLATION.** Registration fees are not refundable after Sept. 21, 2022. Email cancellations to Holly Carson at [hcarson@caionline.org](mailto:hcarson@caionline.org).

**CAI "SUITCASING" POLICY.** CAI has a zero-tolerance policy regarding "suitcasing," which is the practice of non-sponsoring companies or individuals soliciting sales or sales leads in the lobbies, and/or representing their services or soliciting CEO-MC Retreat participants for conflicting social activities. Non-sponsoring suppliers participating in the event as speakers are prohibited from soliciting business in the hotel. Violators of this policy will be charged the Tabletop Sponsorship rate (\$8,500), which must be paid prior to registering as an attendee, exhibitor, or sponsor at any future CAI event. It is considered "bad-form" to conduct business outside of your own tabletop area. Talking to clients or prospects in front of someone else's display also is a violation of CAI policy and will not be tolerated.

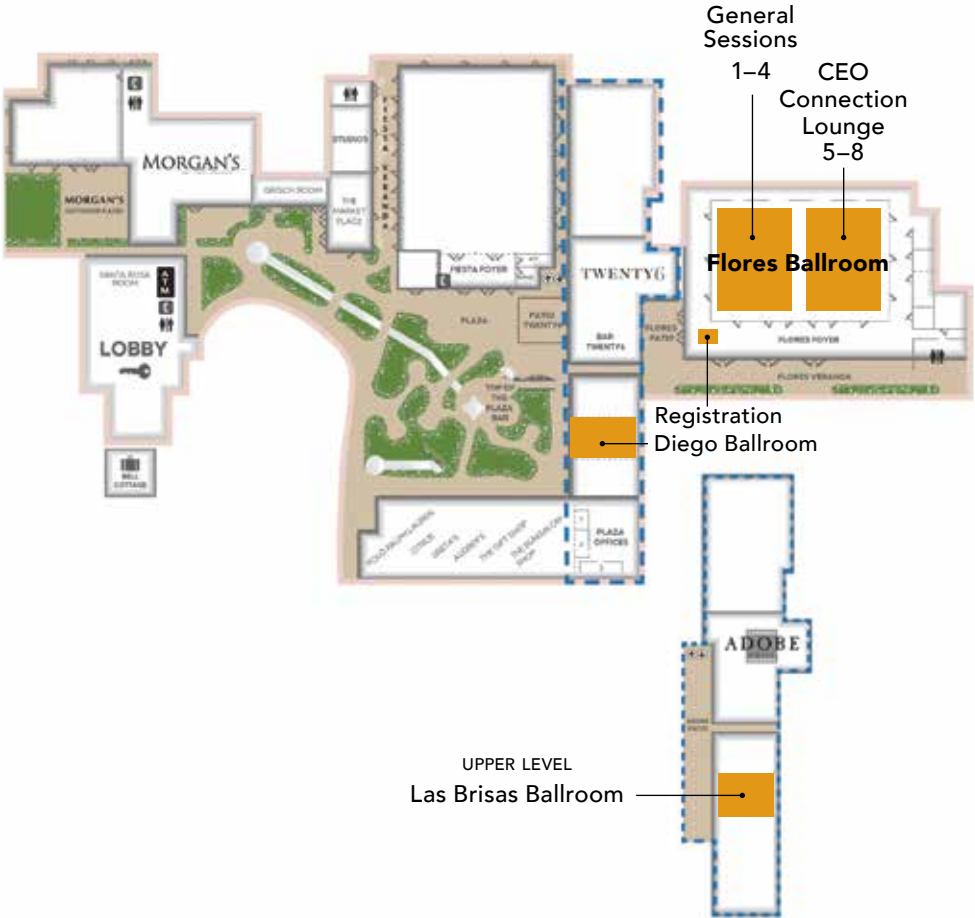
**PRIVATE PARTY POLICY.** All hospitality suites and hosted events must be reserved, approved, and paid for through CAI. Hospitality suites/hosted events are not permitted during official CEO-MC Retreat activities. Non-sponsoring suppliers are not permitted to host OR attend events at the official hotel during the event. Contact Holly Carson for approval at [hcarson@caionline.org](mailto:hcarson@caionline.org).

**Violators of these policies** will be ejected from the CEO-MC Retreat, if applicable, and charged \$8,750, which must be paid prior to registering as an attendee, exhibitor, or sponsor at any future CAI events.

**HARASSMENT POLICY.** In order to provide all participants at events, including members and other attendees, speakers, exhibitors, sponsors, employees, and volunteers, the opportunity to interact professionally and benefit from the event, CAI is committed to providing a safe and productive environment free of discrimination, hostility, harassment, and retaliation based on race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, marital status, citizenship, or any other characteristic protected by law.

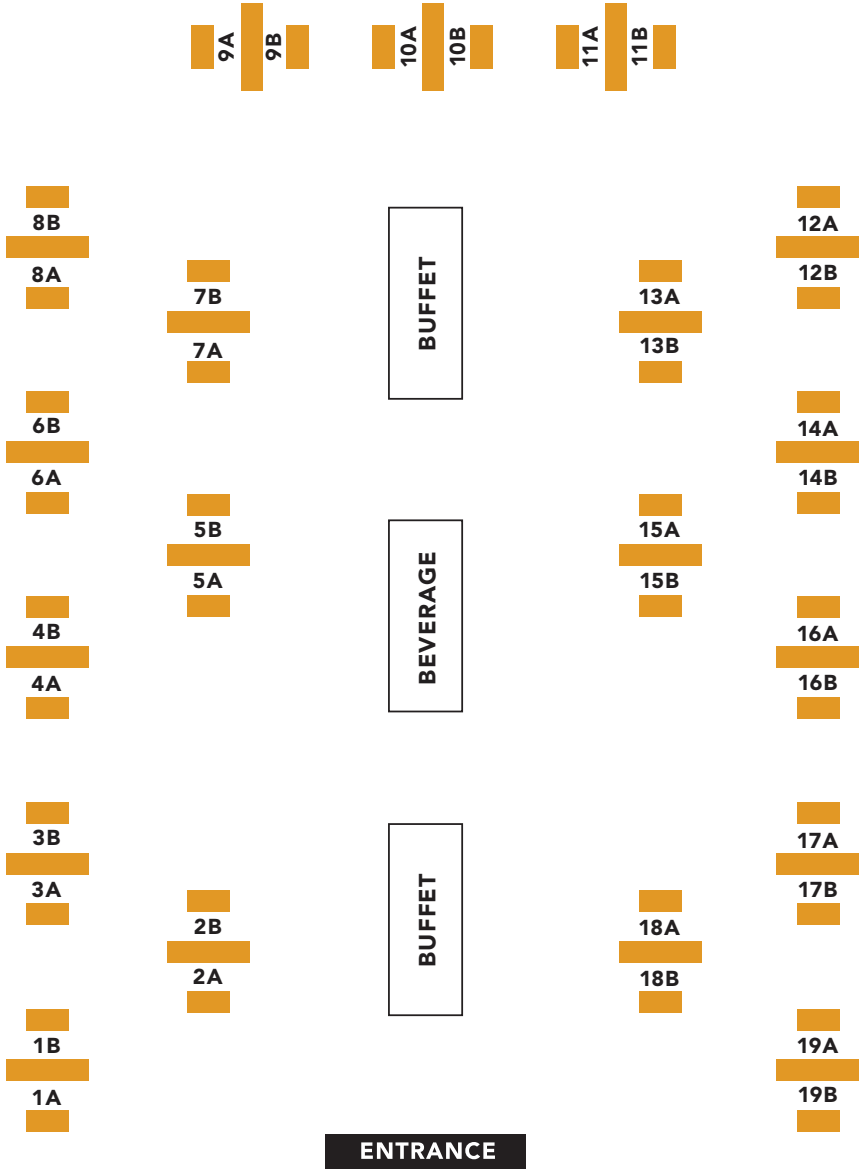
CAI has a zero-tolerance policy for discrimination, harassment, and retaliation and is committed to enforcing this policy at all CAI events. The full policy will be available at the Registration Desk, and you also may visit <https://www.caionline.org/Events/2022Retreat/Pages/CAIPolicies.aspx> for the full policy.

# La Quinta Meeting Space



# CEO CONNECTION LOUNGE

Flores Ballroom 5-8



Open Thursday and Friday | 7:30 a.m.–4 p.m.

*Breakfast and lunch will be served in the lounge.*

Grab a bite to eat and continue making new industry connections in the CEO Connection Lounge. This popular sponsorship experience enables you to mingle with long-time partners as well as new companies, all of whom are offering innovative products and services.

1A



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1B



**resvu**

2A



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2B



3A



PAGE**PER**PAGE

3B



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4A



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4B



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5A

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5B



# CEO CONNECTION LOUNGE

Flores Ballroom 5-8

6A



6B



7A



COMMUNITY ASSOCIATION BANKING

7B



8A



8B



9A



9B



10A



National Cooperative Bank

10B



11A



11B





Open Thursday and Friday | 7:30 a.m.–4 p.m.

*Breakfast and lunch will be served in the lounge.*

12A



12B



13A



13B



14A



14B



15A



15B



16A



16B



17A



17B



# CEO CONNECTION LOUNGE

Flores Ballroom 5-8

18A



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18B



CINC Systems

19A



Community PLUS  
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### GENERAL SESSION VIDEOS

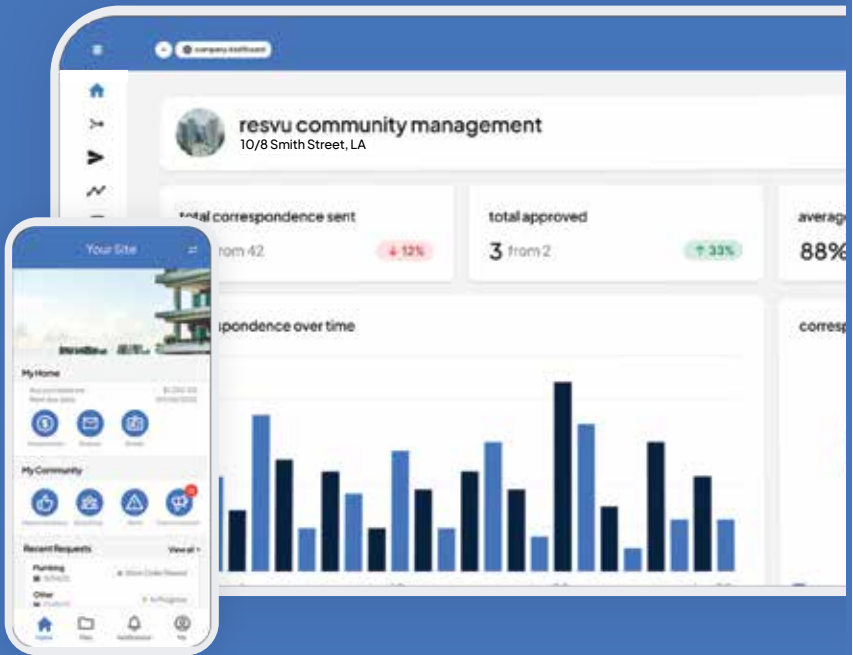
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-  Reporting Analytics

## What Industry Leaders are Saying



**Craig Vaughan**

Founder & CFO  
Castle Group

"VendorSmart<sup>SM</sup> has helped standardize our vendor management process across all teams and regions. This has provided a consistent framework and structure in which our vendors and Community Managers can work and succeed."

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