



Host Application Form Large-Scale Community Association Managers Workshop

I. Mission Statement and Objectives of the CAI Large-Scale Managers Workshop

The purpose and goal of this annual Workshop is to provide a venue for large-scale community managers to come together to share work experiences, review problem issues and share best practices in a learning and social environment. This program is intended to include opportunities for participants to network with their peers, tour community facilities to inspect operational procedures and also benefit from expert presentations on a variety of topics which influence this industry.

Overall Workshop Goals:

- Schedule the event in areas that are geographically diverse from year to year
- Recruit communities for each Workshop that will provide a variety of issues and facilities
- Develop a well-rounded curriculum appealing to large-scale managers
- Present an agenda of diverse topics and issues indicative of the area and the host communities
- Showcase the flavor of the surrounding community in tours and social outings
- Include presentations of current technology and best practices by seasoned experts
- Provide a First Timers Orientation to help new attendees blend into the program
- Sponsor two to four attendee scholarships through the LSMC fund in the Foundation for Community Association Research
- Complete the event with a balanced budget.
- Leave a floating balance of start-up funds for the next host committee

Additional information about objectives and goals are included as an addendum to this application, Host Planning Committee Guidelines & Planning Objectives.

II. Application Information

Name of Manager: _____

Community Association: _____

Web site (if applicable) _____

Telephone: _____ Fax: _____

E-mail Address: _____

Location (Town): _____ State & Zip: _____



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Year you would like to host: 2010 2011 2012 20_____

Association Type: Resort 1st Home Mountain
 Desert Urban Other:_____

Year community began: 19_____ Size (acres):_____ # of Homes:_____

Stage of completion:_____

Unique characteristics of association:

Size of management staff (please attach a staff organization chart): _____

Co-host(s), if any (include community name, contact person and website (if applicable)):

Other associations in the area: _____

Please note that it is recommended that all costs associated with the workshop be kept very reasonable, to encourage participation:

Transportation available:_____

Airlines servicing the area: _____

Nearest airport: (miles from subject property) _____ miles.



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Car rental agencies: _____

Lodging being considered & approximate cost: _____

Proposed Dates: _____
(Since the Workshop is typically held in the Fall, please be sure to avoid all holidays; include major Jewish Holidays)

Please provide details on how the workshop will fulfill each of the priority objectives listed in section I of this form:

- Selection and recruiting of communities and representatives to serve on the planning committee

- Administration of finance, marketing and promotion of the event

- Arranging lodging and meals for attendees

- Travel arrangements to the event (providing information for attendees)

- Transportation to and from event functions

- Sponsorship funding for the event

- Meeting space



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- Education programs and speakers

- Community tours

- Special events and activities

- Spouse activities, as needed

Educational program emphasis being considered: _____

Other details you would like to provide: *(Please feel free to attach additional paper if you have other information you feel is pertinent and/or if the space provided herein is not adequate for your response.)*

III. Vendor/Sponsor Participation Guidelines

Please comment on your workshop's preliminary plans for vendor and sponsor participation: (see applicable section in the Host Planning Committee Guidelines & Planning Overview)



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IV. Staff Requirements

CAI staff will provide administrative support to the committee. The host committee may identify areas where they require additional support. CAI is available to provide such services. Charges for staff time and expenses may apply. Please review the section of CAI liaison staff responsibilities in the Host Planning Committee Guidelines & Planning Overview.

Please provide an overview of what level of staff support you anticipate in conjunction with this Workshop.

V. Acknowledgement of the Host Planning Committee Guidelines & Planning Overview

The Large-Scale Managers Committee approved the Host Planning Committee Guidelines & Planning Overview in 2008. The Guidelines provide general criteria, goals, timelines and frequently asked questions.

Please acknowledge that you have reviewed and agree to the attached Guidelines by signing here:

Signature

Date

V. Application Submission

Thank you for your interest in hosting a future Large-Scale Managers Workshop. The CAI Large-Scale Managers Committee will review your request at an upcoming meeting. Deadline for submission of application is at least 18 months prior to the proposed date of the workshop you would like to host.

Please return completed form to:

Crystal L. Danielson, IOM, CAE
Vice President, Membership and Chapter Relations
Community Associations Institute
225 Reinekers Lane, Suite 300
Alexandria, VA 22314
Phone : (703) 548-8600 (main)
(703) 797-6340 (direct)
Fax: (703) 684-1581
E-mail : cdanielson@caionline.org



Large-Scale Managers Workshop Host Planning Committee Guidelines & Planning Overview

LARGE-SCALE WORKSHOP MISSION STATEMENT

The purpose and goal of this annual Workshop is to provide a venue for large-scale community managers to come together to share work experiences, review problem issues and share best practices in a learning and social environment. This program is intended to include opportunities for participants to network with their peers, tour community facilities to inspect operational procedures and also benefit from expert presentations on a variety of topics which influence this industry.

Overall Workshop Goals:

- Schedule the event in areas that are geographically diverse from year to year
- Recruit communities for each Workshop that will provide a variety of issues and facilities
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- Provide a First Timers Orientation to help new attendees blend into the program
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Host Planning Committee Authority

The Workshop host planning committee reports to the CAI Large-Scale Manager's Committee (LSMC) and coordinates with the CAI staff liaison to the LSMC. In order to provide cohesive leadership, the immediate past host, as well as the current year host and any designated future host will serve as members of the LSMC.

Committee Composition

The Workshop host committee chair is usually the General Manager or equivalent of the primary host community. The chair works closely with the CAI staff liaison and the LSMC. When there are additional host communities, the general manager or a representative from the partnering communities shall serve on the planning committee. Ideally, members of the committee should be from the communities participating in the Workshop as a host or partner.

Committee Objectives

The Workshop host committee is responsible for the planning and execution of the annual Large-Scale Manager's Workshop. This includes every aspect of the Workshop functions from registration of attendees to planning the hotel accommodations, the education track, community tours, dinners and social opportunities for networking and transportation for all Workshop events. CAI liaison staff is available to provide guidance and assistance as needed.

Typical Workshop host committee functions:

- Selection and recruiting of communities and representatives to serve on the planning committee
- Administration of finance, marketing and promotion of the event
- Arranging lodging and meals for attendees
- Travel arrangements to the event (providing information for attendees)
- Transportation to and from event functions
- Sponsorship funding for the event
- Meeting space
- Education programs and speakers
- Community tours
- Special events and activities
- Spouse activities, as needed

CAI liaison staff is available to provide assistance for the following (charges for staff time and expenses may apply):

- Development of the event budget
- Coordination of production and mailing of promotional materials
- Identify and secure hotel or other facilities
- Identify event specifics for the facilities
- Suggest educational presentations, search out and recruit presenters as needed
- Coordination of food and beverage for all events
- CAI staff can and will negotiate and contract for services for these events as needed by the hosts.
- The use of CAI's resources to negotiate and execute the necessary contracts includes the protection of CAI's liability insurance for the event
- Coordination of the First Timers Orientation with the presenters

Workshop planning objectives must include the following:

- Development of education schedule and presenters
- Providing a good balance of educational programs
- Planning community tours specific to large-scale community operations and management
- Coordination of community tours and transportation for attendees.
- Recruiting and preparing staff to assist with tours
- Coordination of logistics and details of all special events (dinners, receptions, spouse events)
- Consideration of the time demands & costs for attendees must be an important part of the plan

FINANCIAL MANAGEMENT

- The LSM Workshop host planning committee and CAI staff should work together to develop an initial operating budget for the Workshop as soon as the LSMC approves the host application. Budget to be submitted to LSMC for review.
- Seed money (\$10,000) from the prior Workshop will be forwarded to the current host to initiate their operating fund as soon as possible after the completion of the prior Workshop event
- CAI staff should be utilized to negotiate and sign lodging contracts and others as necessary (transportation, special events) where it is determined that CAI's liability coverage is required
- Coordination of all incoming and outgoing funds may be handled by the host committee and/or CAI staff as preferred by the host.
- CAI will provide a list of charges for staff assistance with publication design, contract administration, handling mailings, computer website work, etc. Costs for these services must be included in the overall Workshop budget.

- Cost for the CAI staff liaison to the LSMC to attend the Workshop (travel, room and board) must also be included in this budget.

Registration, Funding and Sponsorships

- The participant registration fee shall be established to cover the food, beverage, transportation and event expenses of the Workshop and maintained at a reasonable level
- Registrations may be processed by the host committee or CAI as determined by the host (This process must be established at the outset and agreed to by the host committee and CAI liaison staff)
- Payables for pre-conference deposits and event expenses may also be handled either by the host committee or CAI staff as needed (This process must be established at the outset and agreed to by the host committee and CAI liaison staff)
- A seed money fund of \$10,000 will be provided from the prior LSM Workshop to initialize the necessary business operations for the current host. This fund must be passed on to the next host.
- Solicitation and use of sponsorships is not a requirement and may be used by the host at their discretion for the purpose of helping to offset Workshop expenses and provide additional perks for the benefit and enjoyment of the attendees
- Within 60 days after the current Workshop, the host shall provide a full accounting of all income and expenses and a comparison of budget to actual operations to the LSMC through CAI staff and forward the seed money fund to the next host.

Vendor/Sponsor Participation

- The workshop host(s) may determine how much their workshop will need to be subsidized by sponsors and vendors.
- Hosts may allow two types of registrations for vendors/sponsors:
 - A full registration allowing full participation, with the exception that if bus capacity is reached, managers will have priority on the buses, and vendors/sponsors will have to provide their own transportation to off-site activities; and
 - A “meal package” registration may be available to provide interaction with the attendees during these events only.
- Sponsors and vendors should not be permitted to make presentations to the workshop attendees, unless their participation is pertinent and related to the sharing of information on operational issues.
- Hosts should coordinate and approve any hospitality suites or sponsor/vendor-hosted events. Hosted events should not be permitted during official workshop activities.
- Hosts should clearly communicate the following information to their sponsors/vendors (it is recommended that the information be provided in writing by the hosts to their sponsors/vendors). Since these issues will vary by workshop, only general criteria are listed below:
 - For sponsors, what is the amount of exposure that will be permitted based on the sponsorship amount? (Suggestion: consider setting sponsorship categories, such as Gold, Silver and Bronze, and listing the specific opportunities provided by each category.)
 - When and where is “direct selling” to attendees permitted? When is it prohibited?
 - What are the guidelines for the acceptable conduct of business by vendors/sponsors who are attending the workshop? (Suggestion: consider providing a list of “do’s and don’ts” as part of your letter of agreement or sponsorship information packet. Possible points include limiting direct-selling to the exhibit area during exhibit hours only; negative selling/bashing the competition is not permitted; general information that advances the educational objectives of the workshop is encouraged; etc.)

Scholarships and Reserves - Recognizing that it is not always easy for the host to accurately predict their total income from registrations and sponsorships or their total expenses caused by the number of attendees and unexpected circumstances during any event, the LSMC has established a Reserve Account to handle excess funds remaining, over and above the seed money fund.

- Any excess funds created by the Workshop shall be deposited to the LSMC Reserve Account and used at the discretion of the LSMC to offset expenses for future Workshops and fund scholarships for attendees.
- The first \$5,000 over and above the \$10,000 seed money fund that is generated by any Workshop shall be deposited in the Foundation for Community Association Research and earmarked for LSMC Workshop scholarships.
- Any other excess funds shall be held in the Reserve Account and used by the LSMC to offset future Workshop expenses as needed.
- Hosts of future Workshops may solicit funding from the LSMC to offset extraordinary expenses and/or enhance the value of the Workshop for the attendees.



Large-Scale Managers Workshop Planning Process Overview

Overview

The CAI Large-Scale Managers Committee (LSMC) has been hosting an on-site workshop for large scale community association managers for more than 20 years. The planning process for this invaluable management tool has evolved over the years and will continue to do so in order to meet the ever-changing industry and the needs of our large scale managers. The purpose of this document is to establish a framework for the process. Throughout the planning of the Workshop, it is understood that the Host Committee and CAI staff work closely in order to maintain open communication and ensure the success of each annual Workshop. CAI will provide a list of fees – reviewed by the LSMC – for CAI staff time and expenses, to be included in the Workshop budget.

18-24 Months Prior to Workshop – First step...submit the LSM Workshop Host Application to the CAI LSM staff liaison for review and consideration by the LSM Committee. The application must be as complete as possible and the minimum timeframe for submission is 18 months prior to the planned event, 24 months or longer being preferable.

There are a variety of the following the Host Committee may already have started prior to the LSMC review of their Workshop application in order to ensure everyone involved that they have a viable and functional plan. Once the Host Committee receives LSMC approval, the following steps are critical.

Host Committee Responsibilities

1. Ensure that a planning committee of representatives from the various host communities is in place and provide their names and contact info to the CAI staff liaison.
2. Work with CAI staff to develop operating budget.
3. Work with CAI staff to identify facility for meeting and lodging. The choice of this space is the host's. CAI staff is experienced, willing to assist and capable of negotiating costs to the workshop for hotel room rates and meeting space. CAI must sign the contract in order to cover the liability.
4. Review past history of the LSM Workshop and reviews of the immediate past Workshop to identify preliminary educational and programming options.

CAI Staff Responsibilities

1. Forward Host Application Form to LSMC members for review and approval.
2. Coordinate seed money transfer (\$10,000) from former Workshop host to current host.
3. Supply Workshop host with CD of planning materials and templates from previous workshops.
4. Work with Workshop Planning Committee to develop budget.
5. Work with Workshop Planning to confirm facility for meeting and lodging

12-18 Months Prior to Workshop

Host Committee Responsibilities

1. Post first promotion of the Workshop on the large-scale manager's list serve
2. Develop sponsorship prospectus according to the needs of the budget

3. Begin planning process of identifying activities, speakers and sponsors.
4. Submit preliminary budget of projected overall revenues and expenses to the LSMC Chair and CAI staff.

CAI Staff Responsibilities

1. Post the information about the Workshop on the CAI website and develop timeline for promotion through CAI publications, chapters and outlets
2. Work with Host Committee to confirm sponsorship prospectus

12 Months Prior to Workshop

Host Committee Responsibilities

1. Representatives should attend current year's Workshop to begin promotion of the future Workshop.
2. Work with CAI staff on marketing plan and registration process, which may include:
 - a. List serve and website postings – handled by hosts or CAI as necessary
 - b. Postcard – hosts forward copy to CAI staff; CAI staff design postcard and produce camera-ready file for printing (with approval by hosts); CAI coordinates printing and distribution of postcards. Costs for design, printing and mailing will be charged to the Workshop budget.
 - c. Large-Scale Managers Workshop Website –CAI staff works with host to post information on the large-scale managers' page on the CAI website.
 - d. Registration brochure – hosts forward copy and ideas for marketing brochure to CAI staff; CAI staff design brochure and produce camera-ready file for printing (with approval by hosts); CAI coordinates printing and distribution of brochure – covered in Workshop budget.

CAI Staff Responsibilities

1. Within 60 days following the current Workshop, coordinate forwarding seed money fund of \$10,000, financials and past Workshop schedule to future Workshop host.
2. Work with committee on proposed marketing plan, which may include:
 - a. List serve postings – handled by hosts directly
 - b. Postcard – hosts forward copy to CAI staff; CAI staff design postcard and produce camera-ready file for printing (with approval by hosts); CAI coordinates printing and distribution of postcards.
 - c. Large-Scale Managers Workshop Website –CAI staff works with host to post information on the large-scale managers' page on the CAI website.
 - d. Registration brochure – hosts forward copy to CAI staff; CAI staff design brochure and produce camera-ready file for printing (with approval by hosts); CAI coordinates printing and distribution of brochure.

In addition, CAI coordinates and provides on-site materials to the hosts: CAI badge stock, vendor contacts for badge holders, artwork for signage, hand outs and other materials

6-8 Months Prior to Workshop

Host Committee Responsibilities

1. Post promotion of the Workshop on the large-scale manager's list serve
2. Develop the educational program for the workshop, including educational sessions, tours for hands-on learning opportunities, networking sessions, and team-building and social events. The hosts develop the educational program based on the following guidelines and resources:
 - a. Workshop mission and objectives outlined on the Host Application Form
 - b. Input gathered from past attendees via written and verbal evaluations
 - c. Input from the LSMC and prior hosts
 - d. Unique educational opportunities inherent to the host communities and location
3. Develop the timeline for the activities and events of the Workshop.
 - a. Confirm speakers and share information with CAI staff
 - b. Coordinate transportation (buses) for on-site tours

- c. Identify travel guidelines for participants (closest airports, travel to hotel, etc.)
 - d. Initiate plans for meals, spouse programs and other components.
4. Sponsorship planning: As part of their budget-setting process, the workshop hosts determine how much they will need to rely on sponsorships to ensure the financial success of the workshop. While the hosts have sole responsibility for determining the need for sponsorships, securing the sponsorships, and setting guidelines for costs/benefits of the individual sponsorships, they should make their determinations based on the following guidelines and resources:
- a. The Vendor/Sponsor Guidelines outlined in the Host Application Form
 - b. Input gathered from past attendees via written and verbal evaluations
 - c. Input from the LSM and prior Workshop hosts

6-8 Months Prior to Workshop (continued)

- a. Unique educational and sponsorship opportunities inherent to the host communities and workshop location
- b. Secure sponsors as required by budget and share sponsors with staff as confirmed so the sponsors may be promoted on the CAI website.

CAI Staff Responsibilities

1. Post the information about the Workshop on the website and develop timeline for promotion through CAI publications, chapters and outlets
2. Follow up with speakers on CAI guidelines and expectations
3. Coordinate the planning of the First Timers Orientation

Four Months Out

Host Committee Responsibilities

1. Sponsorships: It is recommended that sponsorships be fully secured at this point, including payment. A full accounting of all sponsorship funding shall be submitted in the financial report submitted to the LSMC after the event.
2. Activities and Events: It is recommended that all activities be confirmed four months prior to the event at the very latest (six months is ideal).
3. Coordinate speaker needs with Host Committee (audio visual, hand outs, etc...)
4. Coordinate participant materials, registration packets and “freebies”.
5. Work with CAI staff to prepare promotional materials and staff a table at the CAI National Conference to promote the event.
6. Facilitate sponsorship income and accounting
7. Facilitate registration income and accounting

CAI Staff Responsibilities

1. Create promotional piece for the event and coordinate distribution of promotional pieces

Almost There – One to Two Months Out

Host Committee Responsibilities

1. Marketing/promotion continues
2. Workshop timeframe and delegation of volunteer responsibilities outlined and confirmed.
3. Continue processing registrations
4. Finalize any outstanding sponsorships

CAI Staff Responsibilities

1. Coordinate speaker requirements with Host Committee
2. Marketing/promotion continues

The Big Event

Host Committee Responsibilities

1. Coordinate volunteers for all Workshop logistics
2. Take photographs to share on the website

CAI Staff Responsibilities

1. One CAI staff person (typically the LSMC liaison) attends the event to assist with registrations and logistics. (Expenses for this staff liaison travel, room and board are to be covered in the Workshop operating budget.)
2. Provide materials and resources from CAI National.

Post-Event

Host Committee Responsibilities

1. Send a formal thank you to all sponsors.
2. Prepare final reconciliation of all income and expenses and report and forward to the LSMC and next host along with any excess funds over the seed money fund amount. Send a copy of this report to the next host also.
3. Forward the \$10,000 seed money fund to the next Workshop host within 60 days after the event.
4. Continue to participate on the Large-Scale Managers Workshop Host Subcommittee, to share insights and guidance for the next year's hosts.
5. Hold a post event host committee evaluation meeting and share information with next host
6. Put together all materials and share with next host

CAI Staff Responsibilities

1. Create and send (via email) evaluations
2. Work with the host on the financial reconciliation
3. Send Workshop certificates to attendees
4. Work with Host to transition materials to future host
5. Compile evaluation responses to share with host and report to LSM Committee

Fiscal Responsibility Policy:

1. A permanent seed money fund of \$10,000 shall be forwarded to the next host for start-up costs.
2. The first \$5,000 of any excess funds will be deposited in the Foundation for Community Association Research and earmarked for LSM Workshop scholarships.
3. Any remaining funds over those allocated above shall be deposited into the LSMC Reserve Account and dispersed at the discretion of the LSMC to defray costs for future workshop attendees. These funds shall not be used to "out-do" the previous host or reduce registration fees that would inequitably affect costs for future workshops. They could be used to buy down hotel room costs, provide airport to hotel transportation or to enhance the workshop experience by providing a significant presentation or speaker to benefit the attendees.



LARGE-SCALE MANAGERS WORKSHOP

FREQUENTLY ASKED QUESTIONS

Following is a list of FAQ's regarding hosting this annual event. The purpose of this list is to provide future hosts with a better understanding of the processes and responsibilities required to establish and execute a successful LSM Workshop. Members of the Large-Scale Managers Committee, CAI staff and past Workshop hosts stand ready to provide any assistance and information required in order to ensure a successful and beneficial experience for all concerned.

What should fees cover?

Fees should cover food, transportation and entertainment during the Workshop. Travel to and from the Workshop is the responsibility of the attendees. Sponsorships should be used to decrease overall Workshop expenses, for take-home goodies (bags/shirts, etc.), and to fund scholarships for attendees, but will not be used to "make a profit." Fees from the operation budget will also be used to pay expenses for the CAI staff liaison (one) to the LSMC to attend the Workshop to assist the host and attend the LSMC meeting.

What goal is a host expected to reach monetarily? Enough to meet the planned workshop budget and pass along the \$10,000 seed money fund to the next host. Any excess funds will be deposited to the LSMC Reserve Account to provide opportunity for future attendees needing assistance.

What accommodations are desired?

High-end hotel accommodations are not necessary or expected, however discount hotels should not be considered. Accommodations near the host communities preferred. Accommodations should a conference center or meeting room. Consideration of the overall cost to the attendees for registration, travel and hotel accommodations is very important.

What entertainment is desired?

Activities and venues unique to the host area of the country and including events that attendees will remember when they reminisce are preferable for each Workshop. When making these arrangements, please keep in mind that some attendees are vegetarians and some do not drink alcohol.

What role should sponsors play?

While the advantage of including sponsors provides a monetary benefit to the Workshop and can add to the educational opportunities for the attendees, the actual participation and interaction with sponsors should be limited and controlled by the host planning group.

What is expected from/for CAI?

There is a CAI staff liaison assigned to the LSMC and that person is available to work with the host committee in whatever capacity the committee desires. Some hosts have the staff to handle creation and mailing of registration forms and processing registrations (both before and during the Workshop). If needed, CAI has capabilities to design and produce logos and printed materials to the host specifications and can negotiate hotel, transportation and event contracts, as needed. The hotel contract should be signed by CAI National for liability reasons. (charges for staff time and expenses may apply)

What kind of educational experience is desired?

Most attendees want a well-rounded experience including industry updates and education as well as touring communities. Sharing successes, mistakes, best practices and operating systems is a key part of the program. Opportunities can include an overview as well as inspections of equipment, systems and schedules, as well as presentations by the host staff and specific vendors who have provided operational assistance. Each workshop program also starts with a First-Timers orientation program.