

“Make no little plans. They have no magic to stir men’s blood and probably themselves will not be realized. Make big plans.”

—Daniel Hudson Burnham, *Urban planning pioneer and architect of Chicago*



CEO-MC Retreat

June 24–26, 2010 | Chicago





THE CEO-MC RETREAT is an executive education program developed exclusively for senior executives in the community association industry. Leaders like you. As a decision maker in the business of community association management, your actions and choices affect the 60 million Americans who reside in more than 300,000 association-governed communities.

Your participation in this event brings you face to face with industry experts, engages you in high-level, facilitated discussions about key topics and broadens your network with other senior executives. Most importantly, it strengthens your business development opportunities by updating you on the latest management and technology trends, introducing you to resources that can improve your bottom line and prepare you for challenges in the highly competitive community associations market.

As a senior executive, you know your company's success depends on you—and that means you've got to cultivate your knowledge, hone your leadership skills and understand what works in today's business environment. With forward-thinking speakers, advanced presentations, peer-to-peer networking and in-depth discussions, the CEO-MC Retreat keeps you at the forefront of industry leadership.

PROFESSIONAL VALUE

- » Practical tips and techniques to improve your day-to-day business operations.
- » Insights from industry peers and experts to advance your business development.
- » Professional contacts to enhance the success of your company and your career.
- » Innovative ideas to recharge your company and motivate your employees.
- » New solutions to build the financial growth and stability of your organization.
- » Industry forecasts and analysis to inform and guide your strategic planning.



SCHEDULE

Wednesday, June 23

Noon–5:00 p.m. CEO Bootcamp (optional)

Thursday, June 24

6:30 a.m.–1:00 p.m. CAI Golf Tournament

11:00 a.m.–Noon Check-in

11:00 a.m.–4:30 p.m. CAI Press Bookstore

Noon–1:30 p.m. Lunch

1:00–4:00 p.m. New Rules of Engagement

4:00–4:30 p.m. State of the Industry Report

4:30–5:30 p.m. Reception

Friday, June 25

7:30–8:00 a.m. Breakfast

8:00–8:30 a.m. The 12 Months Ahead

8:00 a.m.–4:30 p.m. CAI Press Bookstore

9:00–10:15 a.m. The Passion of Leadership

10:30 a.m.–Noon CEO Panel and Large-Group Discussion

Noon–1:30 p.m. Lunch and Health Care Reform Panel

2:00–4:00 pm Technology Breakout Sessions

Saturday, June 26

8:00–9:00 a.m. Breakfast

9:00–11:00 a.m. Rethink, Reinvent, Reposition

EXECUTIVE EDUCATION SESSIONS

- » *New Rules of Engagement: A Technology Road Map for CEOs*
CEO Matt Batt, Pipeline Media
- » *State of the Industry Report*
CEO Tom Skiba, CAE, Community Associations Institute
- » *The 12 Months Ahead*
Chief Economist Lawrence Yun, National Association of Realtors
- » *The Passion of Leadership*
Chairman and CEO Henry Givray, SmithBucklin Corp.
- » *Rethink, Reinvent, Reposition: 12 Strategies to Move Over Your Business*
Author Bill Welter, *The Prepared Mind of a Leader*
- » CEO Panel and Large-Group Discussion
- » Health Care Reform Panel
- » Technology Breakout Sessions



EXECUTIVE EDUCATION SESSIONS

New Rules of Engagement: A Technology Road Map for CEOs

Matt Batt, CEO, Pipeline Media

Today's marketplace can be a tough road to negotiate. Clogged with traffic and noise, full of wrong turns and dead ends, it challenges leadership to forge a new direction. Batt outlines the new rules of the road for increasing your brand exposure, engaging clients and building business.

After working for one of the world's largest association management companies (Smith-Bucklin), Batt founded Pipeline Media Relations. He has helped leading companies, including Cancer Treatment Centers of America, CVS Caremark and Redbox, develop their social media strategies. Batt works with national business and consumer media, regularly landing his clients in outlets such as The Associated Press, *BusinessWeek*, "The Early Show," *Fortune*, "Good Morning America," "Oprah & Friends," "Today," *USA Today* and *The Wall Street Journal*. His media relations work has garnered multiple industry awards.

State of the Industry Report

Tom Skiba, CAE, CEO, CAI

As the only national membership organization dedicated to fostering successful community associations, CAI has a unique and up-close view of the industry. Informed by volunteer leaders, professional managers, management firms and business partners, as well as advocates for legislative and regulatory policies that support responsible governance and effective management, CAI offers a comprehensive picture of the industry. Skiba reports on the challenges, opportunities and trends affecting community associations and their management across the country.

Prior to joining CAI in 2002, Skiba spent 17 years at internationally recognized KPMG Consulting Inc., where he provided critical business advisory support to a wide variety of not-for-profit organizations, including the American Cancer Society, the Smithsonian Institution, the American Red Cross, the Public Broadcasting Service and the National Geographic Society. Skiba has also been responsible for a wide range of presentations and speeches on strategic and management-related topics, many focusing on the challenges facing not-for-profit organizations in a changing economic and technological environment.



The 12 Months Ahead

Lawrence Yun, Chief Economist, National Association of Realtors

Effective leadership is time-dependent; indecision and delays can compromise success. An educated understanding of what lies ahead is one of the most valuable forms of knowledge, allowing you to be proactive, rather than merely reactive. Strategic decisions are guided by the anticipation of the results of actions or inactions; forecasting helps to manage uncertainty. Yun discusses his analysis of the year ahead, helping you anticipate changes, make more informed decisions and better manage uncertainty.

Yun represents the 1.2 million-member National Association of Realtors (NAR). He writes regular columns on real estate market trends, creates NAR's forecasts and participates in economic forecasting panels, including Blue Chip and the Harvard University Industrial Economist Council. He regularly appears on CNBC, BBC and Bloomberg TV and is a frequent speaker at real estate conferences throughout the United States. *USA Today* recently listed him among the top 10 economic forecasters in the country.

The Passion of Leadership

Henry Givray, Chairman and CEO, SmithBucklin Corporation

What drives your organization? What drives you as a leader? Givray discusses his unique insights into the characteristics of effective leaders and helps you identify your own leadership growth opportunities. He also shares his thoughts on the value of a principle-driven company culture that thrives on integrity, trust, stewardship, communication, responsibility, accountability and other core values.

Givray heads the world's largest association management and professional services company. Since his return to SmithBucklin as CEO in 2002, the company has shattered every performance record from the previous 60 years in areas that include client retention, new client acquisition, employee satisfaction, financial performance and growth. Givray's thoughts on leadership and culture have been prominently cited in several books, including *Results Rule! Build a Culture That Blows the Competition Away* by Randy Pennington, *Second to None* by Charles Garfield, *Reinventing Talent Management* by William A. Schiemann and *On My Honor, I Will: The Blueprint for Integrity-Driven Leadership* by Randy Pennington. A dedicated, ongoing student of leadership, he has authored two articles for *BusinessWeek*, "Leadership Lessons from Mom" and "When CEOs Aren't Leaders."



Rethink, Reinvent, Reposition: 12 Strategies to Move Over Your Business

Bill Welter, Author and Managing Director, Adaptive Strategies, Inc.

Does your company effectively respond to change and successfully adapt to the business climate? Welter presents a simple yet effective framework for renewal in today's business environment. He describes the processes and tools by which leadership teams can reinvent their businesses and renew their growth, as well as empower the transformative capabilities of the next generation of leaders.

Welter is a consultant and educator who guides organizations to success by helping managers excel and prepare for the future. He brings more than 40 years of experience spanning four separate careers: military, engineering, consulting and education. In addition to serving as managing director of Adaptive Strategies, Inc., he is also a fellow in executive education at the University of Minnesota and an adjunct professor at the Lake Forest Graduate School of Management. Welter is co-author of *The Prepared Mind of a Leader: Eight Skills Leaders Use to Innovate, Make Decisions and Solve Problems*. His newest book is *Rethink, Reinvent, Reposition: 12 Strategies to Move Over Your Business*.

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CEO PANEL AND LARGE-GROUP DISCUSSION

Thinking Strategically

Facilitator: Tom Skiba, CAE, CEO, CAI

**Mark Lewis, CMCA, AMS, PCAM, Executive Vice President,
Development and Strategic Planning, Associa**

Michael Mendillo, President, The Wentworth Group, Inc.

What is the future of community management? This session offers an exclusive opportunity to exchange ideas with leadership peers from around the country on industry trends, business climate, economic issues and practical resources for successfully managing your business.

Lewis is responsible for Associa's strategies for corporate programs and initiatives, process assessment and implementation, and business growth and alliances. He also serves as chair of Associa's Information Technology Steering Committee. As president and CEO of Community Archives, Lewis used his experience of owning and operating Lewis Management Resources, Inc. to successfully develop and launch a custom software product. A recognized leader in the industry, he has been invited to appear on radio talk shows, testify at government hearings and provide recommendations at the local, state and federal levels related to association regulations.

Running the largest residential property management company in the country, Mendillo has been instrumental in Wentworth's strategic growth initiatives. In 1997, Wentworth partnered with FirstService Residential Management, the global leader in property services. Mendillo has spoken nationally on leadership, service and corporate culture to industry trade associations, service companies and business schools. He serves on the boards of The Foundation for Community Association Research and William Paterson University's Forward Thinking Program. Prior to joining Wentworth, Mendillo was the founder and CEO of Mandell Investment Inc.

HEALTHCARE REFORM PANEL

The Good, the Bad and the Ugly

Facilitator: Andrew Fortin, Vice President, Government and Public Affairs, CAI

The recently passed health care reform bill will bring sweeping changes to the health care industry. The new law imposes a host of coverage mandates on insurance companies, requires that individuals carry insurance and obligates certain employers to provide health care coverage or face penalties. The controversy surrounding these changes has made finding information on the details of the plan a challenge.

This panel brings together experts and insiders to provide you with an understanding of what changes are in store and how best to prepare for the coming regulatory transition. The panel discussion will include an overview of key elements of the new law, an analysis of employer-related requirements and regulations, a discussion of the impact on employees and tax changes. A Q&A session is included.



TECHNOLOGY BREAKOUT SESSIONS

Management and Technology: Where Are We and Where Do We Need to Go?

Kregg Hale, Senior Vice President of Operations, The Continental Group, Inc.

Kevin Wallace, President and CEO, RMI Management, LLC

Technology plays a role in every organization, and it is up to management to define that role. Hale and Wallace discuss technology issues facing management company leaders in today's economy, sharing their expertise while also drawing on the knowledge and experience of session participants.

Hale joined The Continental Group following his operational stewardship of RMI Management from 2006 to 2009. Prior to entering community management, he worked with Fortune 500 companies, helping them achieve operational understanding, income growth, expense containment and long-term value.

Wallace joined RMI Management in 1994 as controller. His expertise in systems and organizational structure led to his advancement to chief operating officer in 1996 and president in 1998. Prior to joining RMI, he was an audit manager with Ernst & Young. He is a member of the American Institute of Certified Public Accountants.

System Solutions for Increasing Your Company's Value

Jim Small, CEO, HOA Profit Gurus and Founder, Parker Finch Management

Is technology helping or hurting your organization's bottom line? Small examines ways technology can contribute to growth and profitability, making you and your organization more efficient and more effective.

An industry pioneer, Small founded Parker Finch Management as the first management company to offer franchisee opportunities to aspiring HOA professionals, establishing successful franchises in Arizona, Colorado and Nevada. He also serves as a consultant for management companies seeking to streamline operations and maximize profitability.

CEO BOOT CAMP

WEDNESDAY, JUNE 23 | NOON–5:00 P.M.

THE CEO BOOT CAMP is an intensive, pre-retreat workshop for CEOs and senior management executives interested in further discussion on specific management topics. Technology is the focus of this year's workshop, examining the up-to-the-minute resources that can save time and money while improving business performance.

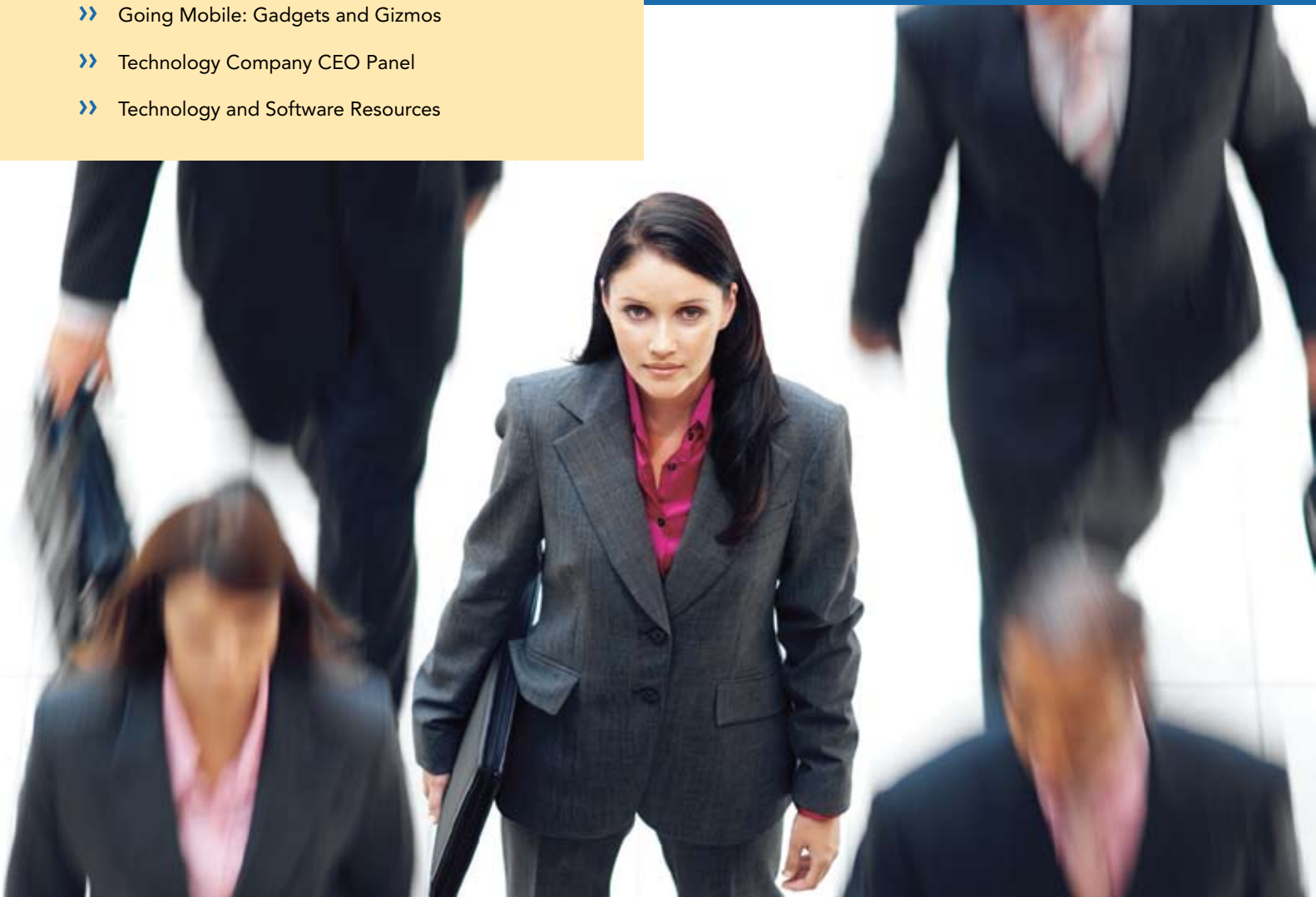
WHO SHOULD ATTEND?

Leaders who want to explore the role of technology in bringing operations to the next level.

CEO Boot Camp is open only to CEO-MC Retreat registrants. To participate, check the Boot Camp option on the CEO-MC Retreat registration form.

CEO BOOT CAMP TOPICS

- » Conferencing Technology for Today's Business
- » Going Mobile: Gadgets and Gizmos
- » Technology Company CEO Panel
- » Technology and Software Resources





InterContinental Chicago

505 North Michigan Avenue
Chicago, IL 60611
(800) 235-4670 reservations

\$209 single/double | \$289 executive suite (limited availability)
Group rate expires May 24 or when the room block is full.

As the only hotel with an entrance on the prestigious Magnificent Mile, the InterContinental Chicago boasts the city's most desirable address, providing the ideal location to enjoy North Michigan Avenue's finest shopping, entertainment and cultural venues. Originally built in 1929 as the Medinah Athletic Club, an exclusive luxury men's club, the hotel combines historic charm with contemporary elegance and is referenced on Chicago's architectural tours.

REGISTRATION

\$525 | Register by May 20

\$585 | Register after May 20

\$195 | CEO Boot Camp

The CEO-MC Retreat is exclusively for senior executives of association management companies.

The CEO Boot Camp is open only to CEO-MC Retreat registrants.

You must be a member of CAI to participate in the CEO-MC Retreat and CEO Boot Camp.

Contact CAI if you have questions about eligibility for participation.



CAI's CEO-MC Retreat

JUNE 24–26, 2010 | INTERCONTINENTAL HOTEL | CHICAGO

To help us better serve you, please complete all 5 sections of this form. Please type or print clearly.

1 Name: _____
Designations: _____
Title: _____
Company/Assn: _____
Nickname: _____
Address: _____
City/State/Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Website: _____
 Please check here if this is new contact information.
 Please check here if you have special needs to participate fully.
Please attach a written description.

2 REGISTRATION FEES: Please check one type of registration below.

On or before May 20: \$525

After May 20: \$585

Retreat attendee

First-time attendee

Mentor attendee*

Please note the retreat begins with lunch on Thursday, June 24, and concludes on Saturday, June 26. All attendees must be members of CAI. One-day registrations are not available. For more information, go to www.caionline.org/events/ceoretreat.

SUBTOTAL SECTION 2 \$ _____

3 CEO BOOT CAMP: Wednesday, June 23, Noon–5:00 p.m.

CEO Boot Camp \$195 (must also attend the retreat)

SUBTOTAL SECTION 3 \$ _____

Restraint of Trade: Whenever competitors within an industry gather together, appropriate care must be exercised to ensure that violations of anti-trust laws do not occur.

All participants of this meeting should avoid any collusive practices or discussions. Collusion is an agreement to fraud and most usually is evidenced in the following anti-trust violations: product boycott, restrictive market allocation, refusal to deal with a third party and price restraining activities.

There need not be written or verbal agreements to fraud. Conversation regarding any of these sensitive areas may be construed as implicit violations.

You should avoid discussing pricing, such as the prices you pay and the prices you charge, including labor costs; market share and allocation; quality ratings of products or suppliers—particularly those that may cause a competitor to lock out or to cease purchasing from a specific supplier; any other areas that might have anti-competitive repercussions. For your own protection and the protection of your company, CAI recommends that should one of these subjects be brought up in any discussion, it would be in your best interest to voice your objections to it and disassociate yourself from the discussion should it continue.

Cancellation Policy: Full refunds will be issued if written cancellation is received by May 19, 2010. Cancellations received between May 20–June 2, 2010, are subject to a 50% administrative fee. Regis-

4 GOLF REGISTRATION: Join your colleagues at the CAI golf tournament. One- and two-day packages will be arranged. Please indicate your interest, and CAI will contact you as soon as pricing information is available.

YES, I want to play in the tournament; please contact me with details when they are finalized.

No, thank you.

SUBTOTAL SECTION 2 \$ _____

SECTION 3 \$ _____

GRAND TOTAL \$ _____

5 PAYMENT METHOD:

Check (payable to CAI)

VISA MasterCard American Express Discover

Address: _____

City/State/Zip: _____

Credit Card Number: _____

Amount: \$ _____ Exp.Date: _____

Name on Card: _____

Signature: _____

> THREE CONVENIENT WAYS TO REGISTER!

CALL: (888) 224-4321 (M–F, 9 a.m.–6:30 p.m. ET, credit card only)

FAX: (240) 524-2424 (credit card only)

MAIL: CAI, P.O. Box 34793, Alexandria, VA 22334-0793

tration fees are not refundable after June 2, 2010. Fax cancellations to Holly Carson at (703) 836-9749.

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 retreat activities. Non-sponsoring companies are not permitted to host events at the official hotel during the retreat.

CAI Suitcasing Policy: CAI has a no-tolerance policy regarding "suitcasing," which describes the practice by non-sponsoring companies or individuals of soliciting sales or sales leads in the hotel and/or representing their services or soliciting retreat participants for social activities.

Violators of these policies will be ejected from the retreat if applicable, and charged \$5,500, which must be paid prior to registering as an attendee, exhibitor or sponsor at any future CAI events.