

Peak Leadership



CEO-MC Retreat

June 23–25, 2011 | Salt Lake City





CEO-MC RETREAT

THE CEO-MC RETREAT is an executive education program developed exclusively for CEOs and senior executives in the community association industry. Leaders like you. As a decision-maker, your influence guides community association management, development and policy, and impacts more than 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 providing the latest management and technology trends, introducing you to resources that can improve your bottom line and preparing you for upcoming challenges in the highly competitive community association 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 places you at the summit of association management and helps you achieve peak leadership.

REBOOT CAMP

CEO-MC Retreat participants are encouraged to attend the Reboot Camp, June 22, an intensive, pre-retreat workshop for CEOs and senior management executives interested in further discussion on specific management topics. Managing for profit is the focus of this year's workshop, examining the resources that can save time and money while improving business performance.

Reboot Camp is an additional fee. It is not included in your retreat registration.

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 company.
- » Industry analysis to inform and guide your strategic planning.

SCHEDULE

Reboot Camp (optional)

Reboot Camp is an additional fee. It is not included in your retreat registration.

Wednesday, June 22

11:30 a.m.–Noon	Registration
Noon–1:00 p.m.	Lunch and Opening Remarks
1:00–2:30 p.m.	<i>Managing for Corporate Profit</i>
2:45–3:45 p.m.	<i>Slaying Goliath: Defending Your Company Against Lawsuits</i>
4:00–5:00 p.m.	<i>Attracting New Business</i>

CEO-MC Retreat

Thursday, June 23

7:30–8:45 a.m.	Breakfast
8:00 a.m.–5:00 p.m.	Registration
9:00 a.m.–5:00 p.m.	CAI Press Bookstore
9:00–10:30 a.m.	<i>Gaining the Edge: Scaling New Heights in Negotiation (Part I)</i>
10:45–11:15 a.m.	<i>Gaining the Edge: Scaling New Heights in Negotiation (Part II)</i>
11:15–11:45 a.m.	Executive Leadership Facilitated Discussion
Noon–1:00 p.m.	Lunch and Opening Remarks
	Ambassador Connect (for first-time attendees)
1:00–2:15 p.m.	<i>Technology for Leadership: What You Need to Know Today</i>
2:30–3:30 p.m.	Breakout Sessions
	Technology
	Management Company Structure
3:30–4:00 p.m.	<i>State of the Industry Report</i>
4:00–5:00 p.m.	Reception

CAI GOLF TOURNAMENT (OPTIONAL)

CAI Golf Tournament is an additional fee. It is not included in your retreat registration.

Join your colleagues at the CAI Golf Tournament. One- and two-day packages available.

Wednesday, June 22 | Promontory Golf Course

Set against a mountain backdrop in Promontory's scenic Painted Valley, the course, designed by Jack Nicklaus, has been carefully planned to delight the senses and reward players of all abilities. Bus departs at 11:30 a.m. from Grand America Hotel; tee time 1:00 p.m.

Thursday, June 23 | Bountiful Ridge Golf Course

Bountiful Ridge is a premier 18-hole mountain golf course with a spectacular view of Great Salt Lake and the valley. Bus departs at 5:15 a.m. from Grand America Hotel; tee time 6:30 a.m.

SCHEDULE (CONT'D)

Friday, June 24

7:30–8:45 a.m.	Breakfast
9:00–10:30 a.m.	<i>Accountability: Four Strategies to Manage Success</i>
10:45–Noon	<i>The Champion Inside</i>
Noon–1:00 p.m.	Lunch
1:00–2:15 p.m.	Keynote Address <i>View from the Summit: Economic Outlook and Your Business</i>
2:30–3:15 p.m.	Breakout Sessions Evolution of a Management Company: Dimensions of Growth Lifecycle of a Management Company: Dimensions of Selling Your Business
3:15–4:00 p.m.	What's On Your Mind? Networking Q&A

Saturday, June 25

7:30–8:45 a.m.	Breakfast
9:00–10:00 a.m.	<i>Peak Leadership: Boredom Is Not an Option</i>
10:00–11:00 a.m.	Pardon the Interruption Interactive Exercise
11:00 a.m.	Retreat Closing

CEO-MC RETREAT TASK FORCE

Kaye Youngren, CMCA, AMS (Chair) | Community Management Inc.

Pam Bailey, CMCA, AMS, PCAM | Chaparral Management Company Inc.

Elbert Boothby, CPM, CMCA, AMS, PCAM | Boothby Realty Inc.

Jim Comin, PCAM | CDC Management Services LLC

Michael Crew, CMCA, PCAM | Homeowner Management Services

James Ransom Daly, CMCA, AMS, PCAM | Association & Community Managing Professionals Inc.

Staci M. Gelfound, CMCA, AMS, PCAM | Association Integrated Management

Chip Hoever, CMCA, AMS | Somerset Management Group Inc.

Michael Johnson, CMCA, AMS, PCAM | FCS Community Management

Howard Pomp | Sentry Management Inc.

Randolph Watkins, CMCA, AMS, PCAM | Del Webb Management Company



EXECUTIVE EDUCATION SESSIONS

Gaining the Edge: Scaling New Heights in Negotiation

Martin Latz | CEO, Latz Negotiation Institute

Today's marketplace can be a tough road to negotiate. Martin Latz, founder of Latz Negotiation Institute, is a nationally acclaimed expert on negotiation strategy and tactics. Since 1995, more than 50,000 lawyers and business professionals from around the world have given his training programs and seminars the highest praise. He is the author of *Gain the Edge! Negotiating to Get What You Want* and is adjunct professor of law for negotiation at Arizona State University College of Law.

Technology for Leadership: What You Need to Know Today

Terry Brock | Syndicated Columnist

As technology evolves so rapidly, it often seems to be running the show. How can a leader make sense of the changes and leverage technology to get more done? This high-energy, high-content presentation demonstrates how to use the right technology to save time and money and be more productive. Terry Brock is a journalist, professional speaker and marketing coach. With a master's degree in marketing and a background in radio and newspapers, Brock brings the practical application of today's technology to business leaders. Based in Orlando, he is the author of *Relationship Marketing*.

State of the Industry Report

Tom Skiba, CAE | CEO, Community Associations Institute

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 view of the industry. CEO Tom Skiba reports on the challenges, opportunities and trends affecting community associations and professional management. 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.

Accountability: Four Strategies to Manage Success

Marjorie Brody | CEO, Brody Professional Development

Do your employees truly embrace and demonstrate accountability? Is your vision to have an organization that is committed and passionate about success? Executive coach Marjorie Brody provides a no-nonsense look at what it takes to succeed in a business environment increasingly filled with tighter budgets, greater demands and increased frustrations. A certified management consultant, certified speaking professional and member of the Council of Peers Award for Excellence Speaker Hall of Fame, Brody is the author of more than 18 books and the recipient of numerous business and entrepreneurial awards.



The Champion Inside

Jason Hall | CEO, The Champion Institute

Jason Hall helps others find their “champion inside” as he motivates them to improve their mindset and attitude. He has helped individuals and companies around the world improve their ability to succeed. Using his powerful personal story weaved with humor, he motivates groups to set and achieve higher goals. After a Jason Hall presentation, participants are inspired to be better people, use gratitude in their lives and persist through any difficulty.

View from the Summit: Economic Outlook and Your Business

Jeff Thredgold | President, Thredgold Economic Associates

Understanding today’s economic trends is more important than ever. How does the current economic outlook affect your business, and to what key information should leaders pay attention? Economic futurist and author of *econAmerica*, Jeff Thredgold shares his perspective on the financial climate. Formerly chief economist for KeyCorp, one of the nation’s largest financial services companies, Thredgold currently provides economic consulting to clients in a variety of industries. He has appeared numerous times on CNN and CNBC and is quoted frequently in *The Wall Street Journal* and *BusinessWeek*.

Peak Leadership: Boredom Is Not an Option

Terry Watson | CEO, Watson World Inc.

Acclaimed speaker Terry Watson motivates senior executives to achieve peak performance through his high-energy presentations. He began his career in real estate, quickly becoming a top-selling realtor and supervising more than 100 people. He has earned numerous industry professional designations, including distinguished real estate instructor, one of only 156 people worldwide who hold the credential. As founder and president of Watson World Inc. consulting firm, he delivers seminars and training to professionals around the globe.

CAI THANKS THE SPONSORS OF THE CEO-MC RETREAT FOR THEIR GENEROUS SUPPORT.

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Grand America Hotel

555 South Main Street
Salt Lake City, Utah 84111
(800) 621-4505 reservations
(801) 258-6000 main
www.grandamerica.com

\$235 Single/Double
\$255 Executive Suite (limited availability)
Group rate expires May 23 or when room block is full.

Enjoy unforgettable ambiance at the only five-diamond hotel in Salt Lake City. Set in the heart of a spectacular valley surrounded by majestic mountain ranges and stunning views, this luxury property was built in 2001 for the Olympic Games. Just 10 minutes from Salt Lake International Airport, Grand America was named by *Entrepreneur* magazine as one of the best business hotels.

REGISTRATION

\$550 | Register by May 19

\$610 | Register after May 19

\$195 | Reboot Camp (optional pre-conference workshop)

You must be a member of CAI to participate in the CEO-MC Retreat. The CEO-MC Retreat is exclusively for senior executives of association management companies. Reboot Camp is only for CEO-MC attendees. Contact CAI if you have questions about eligibility for participation.

REGISTER ONLINE AT www.caionline.org/events/ceoretreat



CEO-MC Retreat

JUNE 23-25, 2011 | GRAND AMERICA RESORT | SALT LAKE CITY

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 19: \$550
 After May 19: \$610

- Retreat attendee
- First-time attendee
- Mentor attendee*

** Be a mentor to a first-time attendee. Share your experience and introduce them to your colleagues.*

Please note the retreat begins with lunch on Thursday, June 23, and concludes on Saturday, June 25. 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 REBOOT CAMP: Wednesday, June 22, Noon-5:00

- Reboot Camp \$195 (must also attend the retreat)

SUBTOTAL SECTION 3 \$ _____

4 GOLF REGISTRATION: Join your colleagues at the CAI Golf Tournament: Promontory on Wednesday and Bountiful Ridge on Thursday. Cost includes green and cart fees, lunch (*Thursday only*) and ride to course. Please indicate which day(s) you want to play and your handicap. **Thursday's outing has limited availability. Please register today!**

- One-day package: Promontory (Park City) (Wednesday)—\$225
- One-day package: Bountiful Ridge (Thursday)—\$90
- Two-day package: (Wednesday & Thursday)—\$315

WEDNESDAY—I wish to be paired with:

1. _____
2. _____
3. _____

I have no pairing preference

THURSDAY—I wish to be paired with:

1. _____
2. _____
3. _____

I have no pairing preference

HANDICAP _____

SUBTOTAL SECTION 4 \$ _____

SUBTOTAL SECTION 2 \$ _____

SECTION 3 \$ _____

SECTION 4 \$ _____

GRAND TOTAL \$ _____

5 PAYMENT METHOD: Full payment must accompany this form.

Paying by credit card? Register online and receive instant receipt of payment. Visit www.caionline.org/events/ceoretreat and click the "Registration" tab.

- Check Enclosed** Made payable to CAI, P.O. Box 34793, Alexandria, VA 22334-0793

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 18, 2011. Cancellations received between May 19-June 1, 2011, are subject to a 50% administrative fee.

Registration fees are not refundable after June 1, 2011. E-mail cancellations to Holly Carson at hcarson@caionline.org

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 conflicting 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.