

CEO-MC Retreat

TRAILBLAZERS

Sept. 29–Oct. 1, 2016 | Montelucia Resort & Spa | Scottsdale, AZ





Community Associations Institute presents
2016 CEO-MC RETREAT
TRAILBLAZERS

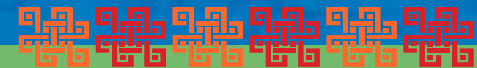
A pioneering leader sees all the paths ahead and blazes forward, forging a new one entirely. A path that sets an example of the fiery determination and foresight that inspires others to tread in the footsteps of greatness. That's the mark of a true trailblazer.

CAI's 2016 CEO-MC Retreat will supply you with the tools you need to guide your company on its path to success. As the premier executive education program for CEOs and senior executives in the community association industry, the retreat puts you on track with industry experts, spurs high-level discussions, broadens your peer network and reignites your business development opportunities by mapping out the latest management and technology trends.

Trailblazing leadership is all about going the extra mile, especially in the highly competitive community associations market. The CEO-MC Retreat refuels your progress in the association management field with innovative speakers, advanced presentations, peer-to-peer networking and in-depth discussions.

According to the Foundation for Community Association Research, there are an estimated 7,000–8,000 management companies in the U.S. with an opportunity to manage communities housing nearly 25 percent of the U.S. population. The executives leading these companies, along with peers from around the globe, are shaping the future of community association living. Join some of the best and the brightest management company executives and play a part in building better communities.

Register today to learn how to navigate your way to the top, deftly outmaneuver obstacles and explore pathways that will inspire you to blaze your own trail.



Trailblazing Benefits

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

WEDNESDAY, SEPT. 28

5:00–6:00 p.m. Welcome Reception

THURSDAY, SEPT. 29

7:30–8:45 a.m. Registration and Breakfast
(participants can check in throughout the day)

9:00 a.m.–4:00 p.m. CAI Bookstore

9:00–10:15 a.m. Opening General Session



The DNA of Success: Effective Leadership...That Sticks!

Steve Harvill | President and CEO,
Creative Ventures

Steve Harvill is one of only a few nationally known speakers to have significant experience in the community association industry, and he brings that expertise to the 2016 CEO-MC Retreat. In recent years, Steve has focused his research on leadership to bring The DNA of Success to organizations like CAI. The DNA of Success is the result of studying leadership teams in seven industries. Presented in multimedia format, this presentation will challenge your perception of impactful leadership. In his research, Steve discovered 11 behaviors that are directly connected to both individual and corporate success. These 11 behaviors cross industry boundaries, providing a menu-driven model for success.

10:15–10:45 a.m. Break

10:45–11:45 a.m. Facilitated Discussion & Idea Sharing

Many participants report that discussions with peers are the most valuable part of the CEO-MC Retreat. Your planning committee members have been listening to you and they're ready to introduce topics, cite examples, share lessons learned and keep the conversation going. Come ready to ask questions, learn from others and share your experiences.



Facilitators

Traci Lehman, AMS, PCAM

Associa-Cities Management, AAMC | Minneapolis, MN

Edward San George, PCAM

Integra Management Corporation, AAMC | Mount Arlington, NJ



THURSDAY, SEPT. 29 (cont'd)

Noon–1:00 p.m.

Lunch

1:00–2:00 p.m.

General Session



The Idea Factory: Discover a Place for Your Ideas
Steve Harvill | President and CEO, Creative Ventures

Companies don't suffer from a lack of ideas, they suffer from not knowing how to make them impactful. They lack processes for developing, implementing and measuring ideas.

In fact, according to the Maurer Group, 78 percent of companies have no ideas system at all. This leads to an average failure rate of 70 percent for launching new ideas. 70 percent!

Ideas vanish from a lack of understanding, a lack of agreement and an utter lack of engagement. For 30 years, Steve has been in the business of creating and developing ideas. He finds his success in The Idea Factory, a simple, efficient and repeatable process for providing a systemic approach to developing ideas. The Idea Factory provides a place for ideas to take form, discover function and, through a committed process, find value.

Steve Harvill, President and CEO of Creative Ventures, has been sharing his concepts and strategies with companies for 30 years. From Fortune 500 companies to small startups, Steve and his Creative Ventures team have developed programs that cross industry lines and challenge the status quo. A scientist by education and the past president of two companies, Steve uses his leadership experience and empirical data to reinforce his assertions. Whether he is presenting, teaching or consulting, his programs on leadership, sales, marketing, innovation and the client experience are guaranteed to leave you with the knowledge you need to take your business to the next level. With a client list that includes Apple, Zappos, IBM, Frito Lay, Morgan Stanley and Wells Fargo, Steve's resume is a testament to the value he brings to each project.

2:00–2:15 p.m.

Break

2:15–3:15 p.m.

Facilitated Discussion and Idea Sharing

3:15–3:30 p.m.

Break

"Spending time with my peers is always a special occasion. We share common issues and achievements, and we make each other better leaders and business owners every time we are together. Adding in great speakers and access to certain vendors, and it's a recipe for a very stimulating, satisfying, and enjoyable retreat!"

Elizabeth Caswell Dyer, CMCA, President and CEO
Sopra Communities, Inc.
Denver, CO

3:30–4:00 p.m.

General Session



State of the Industry Report and Government Affairs Update

Tom Skiba, CAE | Chief Executive Officer, CAI

Dawn Bauman, CAE | Senior Vice President of Government and Public Affairs, CAI

Informed by community association volunteer leaders, professional managers, community management firms and companies that provide products and services to associations, CAI has a comprehensive view of the industry. In this session, Tom reports on the challenges, opportunities and trends affecting community associations and their management professionals, and Dawn presents a federal affairs update covering critical changes to laws and regulations affecting community associations clients and the management profession. Hear about the trends, unique cases and policy positions that you need to be aware of as an industry leader.

FRIDAY, SEPT. 30

7:30–8:45 a.m.

Breakfast

7:30 a.m.–4:00 p.m.

CAI Bookstore

9:00–10:15 a.m.

General Session



Creating a Team Culture

Doug Staneart | President and CEO,
The Leader's Institute, LLC® | Dallas, TX

Whether purposeful or not, cultures are created by the actions, habits, communication skills and people skills of those within that culture. Most organizations just wait for the team culture to develop on its own. Great organizations make a conscious effort to create a culture of teamwork. During this inspiring presentation, you'll learn how to promote team-building successfully within your company.

10:15–10:45 a.m.

Break

FRIDAY, SEPT. 30 (cont'd)

10:45 a.m.–Noon Breakout Sessions

Small-group sessions allow for greater focus and more interaction. Each session will be offered twice (once before and once after lunch).



Breakout Session 1 | How to Hire Great Managers

Facilitator Doug Stanearth | President and CEO, The Leader's Institute, LLC® | Dallas, TX



Breakout Session 2 | Leading Through a Crisis

Facilitator Steve Brumfield, CMCA, AMS, PCAM | Toll Brothers, Inc. Horsham, PA



Breakout Session 3 | Succession Planning for Your Business—Inside and Outside the Family

Facilitator Gary Pittsford, CFP | Castle Wealth Advisors, Inc. Indianapolis, IN

Noon–1:00 p.m. Lunch

1:00–2:00 p.m. Facilitated Discussion and Idea Sharing

2:00–2:30 p.m. Break

2:30–4:00 p.m. General Session

Panel of Expert CEOs

Doug Stanearth | President and CEO, The Leader's Institute, LLC® | Dallas, TX

Doug will facilitate this highly interactive session, which will feature four experts from our own ranks. This panel will represent firms of various sizes and will address key issues about what it really means to lead an organization as CEO. In addition to questions and input from the audience, discussion will focus on key issues like setting corporate direction and goals, creating culture and values, building a team and allocating capital.

Doug Stanearth is President and CEO of The Leader's Institute, LLC® based in Dallas, Texas. Doug spent eight years in training and sales for large companies before founding The Leader's Institute® in 2002. In addition to being a popular keynote speaker, Doug authored best-selling books *Fearless Presentations®* and *28 Ways to Influence People and Gain "Buy-In."* Doug has delivered keynote speeches in more than 50 cities in 45 states and six countries.

SATURDAY, OCT. 1

- 7:30–8:30 a.m. Breakfast
- 7:30–11:30 a.m. CAI Bookstore
- 8:30–9:30 a.m. General Session



Thinking (and Leading) Out of the Box

Mark Robinson | Motivational Speaker, Master Illusionist, Juggler and Comedian

Does leading a management company seem like a juggling act? Or a magic trick? Master illusionist, juggler, and comedian Mark Robinson will have you laughing one minute and learning management insights the next as he unleashes his versatile talents at the 2016 CEO-MC Retreat.

Earning rave reviews at Harrah's in Las Vegas, Mark has shared the stage with comics Jeff Foxworthy and Jimmy Kimmel. Mark's background as a standup comedian and magician make his keynotes unique and unforgettable, and his ability to weave a motivational message into the fun has made him one of the busiest and best motivational speakers in the country. Mark's corporate clients include Coca-Cola, Ford Motor Company and Microsoft.

- 9:30–9:45 a.m. Break
- 9:45–11:30 a.m. Facilitated Discussion and Idea Sharing
- 11:30 a.m. Retreat Adjourns



"I've been attending the CEO-MC Retreat for more than 20 years and I still return home with enough new ideas that pay for the entire trip. The other major benefit is the long-term relationships I've created. Having a network of professionals that aren't in my market with whom I can call to talk through issues is huge."

Edward D. Thomas, CMCA, AMS, PCAM, Chief Executive Officer
Property Management People, Inc., AAMC
Frederick, MD

ACCOMMODATIONS

Montelucia Resort & Spa
4949 East Lincoln Drive
Scottsdale, AZ 85253

Nestled at the foot of Camelback Mountain and surrounded by the Sonoran Desert, the luxurious Montelucia Resort & Spa offers a multitude of on-site and local attractions. Indulge in a mind- and body-transforming treatment at award-winning Joya Spa, or dine on fresh international flavors at the signature restaurant, Prado. Located in Paradise Valley, Montelucia provides convenient access to glamorous shopping districts, entertainment, recreation, fine dining and nightlife. Stumble upon local hidden treasures in Scottsdale, home to an internationally recognized art and culture scene with more than 125 art galleries and museums. Gorgeous parks and exciting hiking trails, paired with the most magnificent views of Paradise Valley's sunrises and sunsets, place Montelucia as the ideal business or vacation destination.

RATES AND RESERVATIONS

CAI Signature Room Group Rate: \$239 + \$4 daily maid gratuity

For reservations, please contact the hotel directly at (888) 627-3010, or online. Reserve your room early, and mention you are a CAI CEO-MC Retreat attendee to receive our discounted group rate. **CAI room rates are available until September 6 or until the room block has been filled.**

TRAVEL ARRANGEMENTS

If you're traveling by air, CAI's preferred travel agency is Frosch Travel. You can contact Frosch Travel at (800) 222-9800. If traveling by car, visit Mapquest.com for easy-to-follow driving directions.

PARTICIPATION

The CEO-MC Retreat is exclusively for CEOs and senior executives of association management companies. Please contact Holly Carson, director of meetings, at hcarson@caionline.org or (703) 970-9240 if you have questions about eligibility for participation.



"I have been attending the CEO retreats for approximately the last two decades and I have found that at each retreat I garner some information that allows me to improve our operation and/or become more profitable."

F. Michael Cadden, PCAM, CAAM, President
Cadden Community Management
Tucson, AZ

2016 CEO-MC Retreat

PLANNING COMMITTEE



CHAIR

Michael Cadden, PCAM

Cadden Community Management | Tucson, AZ



Elizabeth Caswell Dyer, CMCA

Sopra Communities, Inc. | Denver, CO



Thomas Emele, AMS

Associated Property Management | Phoenix, AZ



Jay Gelder, CMCA, AMS, PCAM

Emerald Coast Association Management Inc. AAMC
Miramar Beach, FL



Traci Lehman, AMS, PCAM

Associa-Cities Management, AAMC | Minneapolis, MN



Kevin McGrath, PCAM

Benjamin Cobrin & Company | Narberth, PA



Edward San George, PCAM

Integra Management Corporation, AAMC | Mount Arlington, NJ



Fred Shapiro, PCAM

SBB Management Company, AAMC | Dallas, TX



Linda M. Warren, CMCA, AMS, PCAM

Warren Management Group Inc. AAMC | Colorado Springs, CO



Joseph Wise, CMCA, AMS, PCAM

Wise Property Solutions, AAMC | Johnson City, TN

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

Platinum Sponsors



A division of Western Alliance Bank. Member FDIC.



Mutual of Omaha Bank



A member of MUFG, a global financial group



Partner



Tabletop Sponsors

Association Dues Assurance Corporation

Pacific Premier HOA & Property Banking

Broadband Planning

Pilera Software LLC

Caliber Software

Smartwebs

CINC Systems

SouthData Inc.

CommunityPLUS, a division of North State Bank

Sperlonga Data and Analytics

CoreLogic

Strongroom Solutions Inc.

HomeWiseDocs.com

U.S. Bank

National Cooperative Bank

Village Management Software

Optimal Outsource



www.caionline.org | 888-224-4321