

COMMUNITY ASSOCIATIONS INSTITUTE

CEO-MC



RETREAT



2019 CEO-MC RETREAT
OCT. 2-5, 2019 | LA QUINTA, CA



Community Associations Institute presents
2019 CEO-MC RETREAT

THE ONE THING



Dear Colleague—

As the 2019 Chair of the Planning Committee, I would like to personally invite you to join me, and my colleagues, at the 2019 CEO-MC Retreat in beautiful La Quinta, Calif, October 2–5. Since 1994, the CEO-MC Retreat has been the premier executive education program for CEOs and senior executives in community association management companies. As a decision-maker, your influence guides community association management, development and policy, and has a significant impact on the more than 63 million Americans who reside in over 320,000 association-governed communities.

Why Should You Attend?

The planning committee has listened to your input and has designed an informative three-day program. We will hear from dynamic speakers, and have space to learn and engage with each other. We expect over 200 of our CEO and senior executive friends to join us, supported by a leading group of industry Business Partners. Our theme this year is “The One Thing” – learning or identifying one thing you can act on immediately to improve in three areas: yourself as a leader, your business, and your future. Come connect with us and gain focus and clarity on “the one thing” that could make a BIG impact on your company.

Location. Location. Location. The La Quinta Resort and Club, part of the Waldorf Astoria Hilton collection, is the kind of place you’ll want to spend extra time. From the beautiful grounds to spectacular views – we guarantee you’ll enjoy your time here.

I hope you will join me in La Quinta – so we can all learn, engage, connect and enjoy all that the Retreat has to offer.

Sincerely,

Jay Gelder, CMCA, AMS, PCAM
Emerald Coast Association Management AAMC
Miramar Beach, FL

“The CEO-MC Retreat is a wonderfully dynamic event. From the amazing speakers to fabulous networking opportunities to the location – this is why I come back year after year” —2018 Retreat Attendee

For questions about the Retreat, please contact Holly Carson, Director of Meetings at hcarson@caionline.org or 703-970-9240. Retreat participation is exclusively for CEOs and senior executives of association management companies.



WEDNESDAY, OCT. 2

4–6 p.m.	Registration
4:30–6 p.m.	Welcome Reception
6 p.m.	Program Adjourns for the day (connect with sponsors for after-hours Retreat activities)

THURSDAY, OCT. 3

7:30 a.m.–4 p.m.	Registration
7:30–8:45 a.m.	Breakfast
7:30–8:45 a.m.	Planning committee breakfast with first-time attendees
9 a.m.–4 p.m.	CAI Bookstore
9–10:30 a.m.	Opening General Session
10:30–11 a.m.	Break
11 a.m.–Noon	Opening General Session Part II
Noon–1:30 p.m.	Lunch
1:30–2:30 p.m.	General Session
2:30–3 p.m.	Break
3–4 p.m.	General Session Part II
4 p.m.	Program Adjourns for the day (connect with sponsors for after-hours Retreat activities)

FRIDAY, OCT. 4

7:30–8:45 a.m.	Breakfast
7:30 a.m.–4 p.m.	CAI Bookstore
9–9:10 a.m.	Welcome and Announcements
9:15–10:30 a.m.	Breakout Sessions
10:30 a.m.–10:45 a.m.	Break
10:45 a.m.–Noon	Breakout Sessions (Repeat)
Noon–1:30 p.m.	Lunch
1:30–2:30 p.m.	General Session
2:30–3 p.m.	Break
3–4 p.m.	General Session Part II
4 p.m.	Program Adjourns for the day (connect with sponsors for after-hours Retreat activities)

SATURDAY, OCT. 5

8–9 a.m.	Breakfast
8–11 a.m.	CAI Bookstore
9–11 a.m.	Optional Closing Session & Discussion Groups
11 a.m.	Retreat Adjourns

**GENERAL SESSION | Thursday, 9 a.m.–Noon****Community Next: Leading Perspectives for 2020 and Beyond**

The CEO-MC Retreat opens with a dynamic and interactive look at where we are as an industry and where we are headed. Because you as CEOs are key to shaping this future, the presenters will incorporate audience involvement, and table group discussions. Cat, Tom, and Dawn will explore with you the industry's key trends, challenges, and opportunities.



Tom Skiba is the Chief Executive Officer of Community Association Institute's national office in Falls Church, Virginia.

Thomas M. Skiba, MBA, CAE, Community Associations Institute, Falls Church, VA



Cat currently serves as the 2019 President of CAI. She has been serving the community association profession for three decades, both as a management company executive and as a financial services professional.

Cat Carmichael, CMCA, PCAM, CEO, Strategy123, Orange County, CA



Dawn and her team monitor legislation at the federal level and in all 50 states. Dawn provides perspective on critical changes to laws and regulations affecting community associations and the management profession.

Dawn Bauman, CAE, Community Associations Institute, Falls Church, VA

GENERAL SESSION | Thursday, 1:30–4 p.m.**Engaging Your People...Five Principles That Move People, Passions and Product****Dr. Matt Townsend**

With more than 70% of US employees showing signs of being disengaged while at work, this is the training to reignite the spark with your team. In this interactive training, we will review the five motivating, driving principles of Choice, Trust, Understanding, Mutual Benefit and Growth. By the end of the training, each participant

will have a greater sense of where they may be losing some of their "engagement" and a plan to immediately begin to, as Gandhi puts it, "Become the change they seek in the world."

Matt Townsend is the epitome of Edu-tainment. For over 20 years, he has been involving audiences with his unique approach to building and maintaining business relationships. Matt has the perfect mix of cutting edge research in communication and human relationships combined with the skill of a top-notch humorist. Matt has worked extensively in the areas of results-oriented communication with hundreds of Fortune 500 companies such as CNN, Cox Communications, and Lockheed Martin. Other past clients include: AT&T, American Express, Dupont, General Mills, Hewlett Packard, Honda, IBM, Nike, and the US Army, and the US Navy.



BREAKOUT SESSIONS

Friday, 9:15–10:30 a.m. (Repeat 10:45 a.m.–Noon)

Small-group sessions allow for greater focus and more interaction.

Each session will be offered twice.



Breakout Session 1: *The ONE Thing - You as a Leader*

■ Facilitators: Julie Adamen & Rolf Cocker, AMS

Train 'em, Trade 'em or Train wreck? Developing the leadership skills of your community managers, while ensuring they have the tools needed to do the job. Julie and Rolf have taught thousands of people in this industry all over the country. Julie is the principal of Adamen Inc., a national consulting and employment firm specializing in the community management industry formed in 1997. She is a recognized expert in community management, and company operations. She is a prolific author, educator, motivational speaker and trainer for managers and Boards of Directors. Rolf Crocker is the Principal and Chief Executive Officer of OMNI Community Management in Fair Oaks, California. He began his career in Community Management as an On-Site Maintenance Manager in 1988. Rolf has served in a variety of management capacities in the community association industry, including CEO of M&C Association Management Services and concurrently, the National Vice President of developing training and education with Associa.

Breakout Session 2: *The ONE Thing - Your Business*



■ Facilitator: Caroline Leach

Caroline was vice president of communications at DIRECTV and AT&T before starting her own firm. Her session focuses on using social media to strengthen your company. Research shows 82% of people are more likely to trust a company whose leadership team engages with social media. Your leadership team can boost their careers, the community association management profession, and your company by sharing information with stakeholders. Effective leaders build strong relationships with internal and external clients.

Breakout Session 3: *The ONE Thing - Your Future*



■ Facilitator: Jonathan Louis, CMCA, AMS, LSM, PCAM
Panel of technology leaders

CEO-MC Planning Committee member Jonathan Louis, PCAM, LSM, facilitates a forward-looking panel discussion of upcoming technologies. Experts from several CAI Business Partner firms will share their perspective on trends and innovations in our industry. Questions and discussion with the audience will focus the content on what is most important to you and your firm. Jonathan is Chairman and Chief Executive Officer of Association Specialty Group in Pembroke Pines, FL. Prior to forming his company, Jonathan had extensive experience in the hospitality industry, including Hyatt Hotels, Sheraton Hotels, and served as CEO of a Martha's Vineyard based hotel and resort management company.

GENERAL SESSION | Friday, 1:30–4 p.m.

What Big Brands Know -- How You Can Apply It To Your Management Company



Gerry O'Brion, CSP

You can use the same strategies as billion dollar brands to grow your business. The strategies big brands use are not complicated, and as the CEO of a management company, you can learn them. As a business owner (or management company executive), this information will improve your business, regardless of the size. This presentation is packed with information, strategies and case studies about companies that are doing it right. Gerry's presentation is a fun, thought-provoking dialogue that generates real action at our CEO-MC Retreat. He delivers a balance between great marketing tactics and fun engaging stories to show how to use them.

Gerry built his career growing big brands and distills that experience into creating strategies that are actionable immediately. After earning his MBA at the University of Michigan, he worked with Procter & Gamble on brands such as Crisco, Tide, Mr. Clean, and Spic & Span. Next, at Coors Brewing Company he managed Coors Light, a \$2 billion business. He was then VP of Marketing for the \$1.5 billion Quiznos restaurant chain. Gerry was most recently VP of Marketing for Red Robin Gourmet Burgers, a \$1 billion brand.

OPTIONAL: BONUS CLOSING SESSION | Saturday, 9–11 a.m.

Breakfast and Discussion Groups

Come down for breakfast and small group discussions before your trip home. Topics are chosen by participants.





La Quinta Resort & Club, A Waldorf Astoria Hotel

49499 Eisenhower Drive
La Quinta, CA 92253
760-564-4111

Discounted rate is **\$229** plus a **reduced resort fee of \$20**

Cut-off Date: **September 6, 2019** or until the block is filled

To obtain the rate, tell them you are with 2019 CEO-MC Retreat.

Resort Fee Includes:

- Unlimited use of the Fitness Center
- In-room coffee service
- High-speed internet access
- Shuttle for individual transfers to Resort and PGA West Golf Courses
- Driving range use including balls
- Golf bag storage
- Lawn games
- Local, toll-free, and credit card calls (no access fee)
- Complimentary self and valet parking

Nestled beneath the beautiful Santa Rosa Mountains, offering championship golf courses, an award-winning spa, 41 pools and five outstanding restaurants, this luxury desert retreat offers the ultimate Palm Springs getaway. Set amongst 45 vibrant acres, La Quinta Resort & Club is the ultimate golfer's paradise. The resort boasts amenities including:

- Five championship golf courses
- 23 tennis courts
- 41 outdoor pools
- Seven distinctive restaurants
- Award-winning Spa La Quinta
- Pet friendly services including a bone on arrival and a Pet spa

After a long day basking in the California sunshine, enjoy delectable dishes inspired by the bounty of the Coachella Valley and crafted into deliciously healthy dishes, whether it's at Morgan's in the Desert Adobe Grill, or any of our restaurants. With live music on the open-air plaza and hand-crafted into deliciously healthy dishes, whether it's at Morgan's in the Desert Adobe Grill, or any of our restaurants. With live music on the open-air plaza and hand-crafted signature cocktails, let your cares drift away and bask in the beautiful views.



Cancellation Policy:

Full refunds will be issued if written cancellation is received by August 23, 2019. Cancellations received between August 24-September 12, 2019, are subject to a 50% administrative fee. Registration fees are not refundable after September 12, 2019. Email cancellations to Holly Carson at hcarson@caionline.org.

CAI "Suitcasing" Policy:

CAI has a no 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 retreat participants for conflicting social activities. Non-sponsoring suppliers participating in the retreat as speakers are prohibited from soliciting business in the hotel. Violators of this policy will be charged the Tabletop Sponsorship rate (\$6,000), 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 is also a violation of CAI policy 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 Retreat activities. Non-sponsoring suppliers are not permitted to host OR attend events at the official hotel during the Retreat.

Violators of these policies will be ejected from the Retreat if applicable, and charged \$6,000, which must be paid prior to registering as an attendee, exhibitor, or sponsor at any future CAI events.





2019 CEO-MC RETREAT PLANNING COMMITTEE



Chair

Jay Gelder, CMCA, AMS, PCAM
Emerald Coast Association
Management, Inc. AAMC
Miramar Beach, FL



Vice Chair

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



Past Chair

Edward San George, PCAM
Integra Management Corporation AAMC
Mount Arlington, NJ



Lesley Stoeffler, CMCA
Community Management
Services, Inc.
Indianapolis, IN



Jonathan Louis, CMCA, AMS, LSM, PCAM
Association Specialty Group, LLC, AAMC
Pembroke Pines, FL



Liaison to CAI Managers Council

Brian Murphy, AMS, PCAM
ProActive Professional Management AAMC
Lake Forest, CA



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

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