

RETREAT RECHARGE RECONNECT

2020 CEO-MC RETREAT

Sept. 23-26

The Diplomat Hotel | Hollywood, Fla.

CEO-MC Retreat is the premier destination
for community association management chief executive officers
and management company executives.

 Register now at
www.caionline.org/2020CEORetreat


community
ASSOCIATIONS INSTITUTE

RETREAT RECHARGE RECONNECT

Community Associations Institute presents
2020 CEO-MC RETREAT



Dear Colleague—

As the 2020 Chair of the CEO-MC Retreat Planning Committee, I would like to personally invite you to join me at the 2020 CEO-MC Retreat in Hollywood, Fla., Sept. 23–26.

As we look forward to hosting a successful event, please know that safety is our top priority. Many of you are asking: How will social distancing impact the event? How will the Retreat be different this year, considering all the new ways our lives have changed?

We're asking those questions too. The CAI staff is working behind the scenes with the planning committee, the Diplomat Resort, Hilton International, and local/state authorities to ensure we can all gather safely. Yes, there may be some adjustments, but our goal remains the same—providing community association management CEOs and senior executives an excellent place to share insights, learn best practices for today and tomorrow, and build meaningful relationships.

WHY SHOULD YOU ATTEND?

The planning committee has listened to your input and has designed an informative two-day program. We will hear from dynamic speakers and have space to engage with each other. You'll learn how to be a more effective leader, how to drive your company to be more data- and analytics-driven, effective approaches to leadership communications, and so much more. We expect many of our CEO and senior executive friends to join us, supported by a leading group of business partners. I hope you will join me in Florida, so we can learn, engage, connect, and enjoy all that the Retreat has to offer.

Sincerely,

Elizabeth Caswell Dyer, CMCA
Sopra Communities, Inc.
Denver

“I always leave the CEO-MC Retreat with at least three things that I’d like to implement in my company. This is extremely beneficial in a world where technology continues to change the way we do business.”

—2019 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.



PROGRAM SCHEDULE

WEDNESDAY, SEPT. 23

9 a.m.–4 p.m.

OPTIONAL PRE-CONFERENCE WORKSHOP

M-310: Management Company Administration *(additional fee applies)*

5–7 p.m.

Welcome Reception

THURSDAY, SEPT. 24

7:30–4 p.m.

Registration

7:30–8:45 a.m.

Breakfast

7:30–8:45 a.m.

Planning Committee Breakfast with First-Time Attendees

9–9:10 a.m.

Welcome from Elizabeth Caswell Dyer, CMCA,
Chair of CEO-MC Retreat Planning Committee

9:10 a.m.–Noon

OPENING GENERAL SESSION

Community Next: Leadership Perspectives for Current Challenges and Opportunities with Tom Skiba, Ursula Burgess, and Dawn Bauman

10:30–11 a.m. Break

12–1:30 p.m.

Sponsors Luncheon

Enjoy lunch with our sponsors. See what's new and exciting in the industry.

1:30–4 p.m.

GENERAL SESSION

Building a Culture of Trust with Robin Dreeke

2:30–3 p.m. Break

4 p.m. Adjourn for the day

FRIDAY, SEPT. 25

7:30–8:45 a.m. Breakfast

9–9:10 a.m. Welcome & Announcements

9:15–10:30 a.m.

Breakout Sessions Round 1

10:45 a.m.–Noon

Breakout Sessions Round 2

Noon–1:30 p.m.

Sponsors Luncheon

Enjoy lunch with our sponsors. See what's new and exciting in the industry.

1:30–4 p.m.

GENERAL SESSION

Leadership & Communication for CEOs in a Changing World with Lori Baker-Schena

2:30–3 p.m. Break

3–4 p.m. Wrap up and announcements, then adjourn for the day

SATURDAY, SEPT. 26

8–10 a.m.

Breakfast & Final Thoughts

Gather for your last networking opportunity and grab a cup of coffee and some breakfast on your way home.

10 a.m. Retreat Adjourns

**Schedule as of July 2 and subject to change. For up-to-date information, please see the [event page](#).*

GENERAL SESSIONS

THURSDAY, SEPT. 24 | 9:10 a.m.–Noon

Community Next: Leadership Perspectives for Current Challenges and Opportunities

As management company executives, your voice helps to shape the community association housing model and supports CAI in developing professional education, training, and resources for community association managers, board leaders, and business partners. We want to hear from you. Join CAI's leaders as they host an interactive session exploring the state of the community association housing model. This is your moment to share solutions to hard-hitting questions and participate in candid conversations about what's next for the industry and your companies.

Plan for a discussion outlining a variety of state and federal legislative and regulatory matters shaping the community association housing model and ways to prepare your business. Hear how CAI plays a prominent role in advocating for community associations and the management profession.



Thomas M. Skiba, CAE, is chief executive officer of CAI.

Ursula K. Burgess, Esq., is an attorney with Rees Broome, PC, in Tysons Corner, Va., president of the CAI Board of Trustees, and a fellow in CAI's College of Community Association Lawyers.

Dawn M. Bauman, CAE, is CAI's senior vice president for government and public affairs.



THURSDAY, SEPT. 24 | 1:30–4 p.m.

Building a Culture of Trust with Robin Dreeke

twitter.com/rdreeke

Robin Dreeke is the founder and president of People Formula LLC, offering advanced rapport building consultation to military, government, and companies across the country. He previously served as the head of the behavioral analysis program of FBI's Counterintelligence Division.

Robin has authored *The Code of Trust: An American Counter Intelligence Expert's Five Rules to Lead and Succeed* and *Sizing People Up: A Veteran FBI Agent's User*

Manual for Behavior Prediction.

Effective CEOs understand that leadership requires trust. Employees, clients, and business partners want to be able to trust the leaders of the organizations they work with. Robin will lead us through a proven way to build trust with anyone in any given situation.



FRIDAY, SEPT. 25 | 1:30–4 p.m.

Leadership & Communication for CEOs in a Changing World with Lori Baker-Schena

www.loribakerschena.com

Recent months have made the role of CEO more important than ever before. Lori will share lessons learned from CEOs dealing with unexpected challenges and changes, using principles that you can apply in your company immediately. She will also facilitate a best practices discussion to help you communicate with your peers to focus more sharply on your industry and the issues you are facing right now.

BREAKOUT SESSIONS FRIDAY, SEPT. 25 | 9:15–10:30 a.m. and 10:45 a.m.–Noon

Small group sessions allow for greater focus and more interaction. Each session will be offered twice.



BREAKOUT SESSION 1

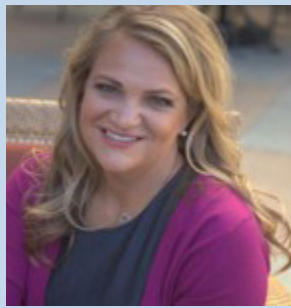
CEO Effectiveness—Recharge “You as the Leader”

Facilitator: Georganne Goldblum

<https://executivecoaches.vistageflorida.com/coach/georganne-goldblum/>

This session is focused on the CEO. In this session, Georganne will share insights from working with hundreds of CEOs in many different industries. How do the best CEOs manage themselves? What helps them be more effective personally and as leaders?

The South Florida Business Journal named Georganne one of the top 25 most influential businesswomen in South Florida. Georganne has been one of the leading executive coaches in Florida for the last 17 years. Drawing from her own marketing background at five Fortune 500 companies, she coaches CEOs and helps them reach their goals. Before moving to Florida, she ran a company in Philadelphia, grew it five-fold, and sold it. The CEOs she coaches have had similar success with their companies.



BREAKOUT SESSION 2

Business Intelligence and the Allocation of Capital

Facilitator: Heather Cole

www.heatherized.com

Today’s CEOs are also analytic leaders who guide their companies through the cultural shift required to become data- and analytics-driven. Companies that adapt in the data revolution will dominate their market and lead innovation in their industries. CEOs of management companies face decisions about allocating capital. Your management company can effectively leverage IT, data, and technology to inform these decisions. This presentation provides CEOs with pragmatic methods they can implement immediately.

Heather is a two-time best-selling author, a five-time winner of the IBM Champion Award, and is on the national board of the FEI (Financial Executives International). She also volunteers with Ready for Life, a charity that helps youth who age out of foster care. Her book, *Business Intelligence Bull’s-Eye*, will be made available to all CEO-MC attendees. She is the founder of Lodestar Solutions and Heatherized, Inc. As a business analytics advisor, she provides over 25 years of experience in finance, IT, law, psychology, sales, and marketing. Heather is a certified high-performance coach, licensed attorney, and scrum master.



BREAKOUT SESSION 3

Reconnect with Your Stakeholders: Employees, Clients (and Everybody Else)

Facilitator: Lori Baker-Schena

www.loribakerschena.com

The role of CEO and senior executive at management companies often comes with the need to connect with a wide variety of people in all kinds of situations. From crisis communications with a reporter to one-on-one coaching with a struggling employee, CEOs are usually expected to have the answers and be the public face of the company.

This session will feature a facilitated discussion of effective approaches to leadership communications.

“Dr. Lori” has a unique background for working with our industry: She’s worked with community association leaders for several years, leading programs for both CAI chapters and management companies around the country. Her experience includes public relations, health care, university teaching, and journalism. She has a degree in journalism, a master’s degree in business administration from California State University, and a doctorate in organizational leadership from the University of La Verne.

WHERE WE'LL BE

The Diplomat Beach Resort Hollywood,
Curio Collection by Hilton
3555 South Ocean Drive
Hollywood, FL 33019



ROOM RATES

Deluxe Rooms (Balcony/Intracoastal View) \$249
Grand Deluxe Rooms (Balcony/Ocean View) \$269
Cut-off Date: Aug. 21 or until the block is filled

BOOK NOW
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ONLINE
RESERVATIONS LINK

EVENT SAFETY PLAN

Hilton is committed to the safety of their guests. Hilton CleanStay builds upon Hilton's already high standards of housekeeping and hygiene, where hospital-grade cleaning products and upgraded protocols are currently in use. For more information, visit <https://newsroom.hilton.com/corporate/news/hilton-defining-new-standard-of-cleanliness>.

RESORT FEE

Attendees who are Hilton Honors Gold or Diamond Members: The applicable perks based on the program guidelines will be received.

Attendees who opt in at check-in receive a discounted resort fee of \$20 daily. The reduced resort fee includes:

- Basic guestroom internet
- Local and toll-free calls
- Two bottles of water day of arrival
- Up to four beach chaise lounges per day
- One group fitness class per day
- Non-motorized water sports

The Diplomat Beach Resort is perfectly situated between Miami and Fort Lauderdale along Florida's Gold Coast. The oceanfront resort features two beachside pools, Kids' Club, Dip & Slide Waterpark, and a private beach with an array of water sports such as jet skiing, kayaking, and paddle boarding.



Masks will be provided for all attendees



Hand sanitizer stations will be placed throughout the meeting space



Food and beverages will be pre-packaged or served cafeteria style for minimal contact



All seating will allow for social distancing



Hilton CleanStay guarantees sealed clean guest rooms



All high-touch areas in rooms and hotel will be cleaned with extra disinfectant

RESTRAINT OF TRADE POLICY

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 objection to it and disassociate yourself from the discussion should it continue.

CAI ANTI-HARRASSMENT POLICY

In order to provide all participants at events, including members and other attendees, speakers, exhibitors, sponsors, employees, and volunteers, the opportunity to interact professionally and benefit from the event, CAI is committed to providing a safe and productive environment free of discrimination, hostility, harassment, and retaliation based on race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, marital status, citizenship, or any other characteristic protected by law. CAI has a zero-tolerance policy for discrimination, harassment, and retaliation and is committed to enforcing this policy at all CAI events. Visit www.caionline.org/anti-harassment for the full policy.

CANCELLATION POLICY

Full refunds will be issued if written cancellation is received by Aug. 12. Cancellations received between Aug. 13–26 are subject to a 50% administrative fee. Registration fees are not refundable after Aug. 26. 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 nonsponsoring companies or individuals soliciting sales or sales leads in the lobbies, and/or representing their services or soliciting Retreat participants for conflicting social activities. Nonsponsoring suppliers participating in the Retreat as speakers are prohibited from soliciting business in the hotel. Violators of this policy will be charged the event 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 and 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. Nonsponsoring 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.

2020 CEO-MC RETREAT PLANNING COMMITTEE



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

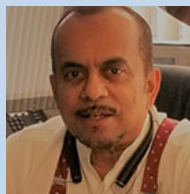


Vice Chair
Laura Hall, CMCA
Community Management, Inc., AAMC
Portland, Ore.



Past Chair
Jay Gelder, CMCA, AMS, PCAM
Emerald Coast Association
Management, Inc., AAMC
Miramar Beach, Fla.

Committee Members



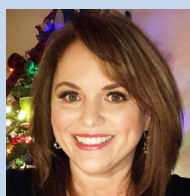
Jonathan Louis, LSM, PCAM
Association Specialty Group
Pembroke Pines, Fla.



Edward San George, PCAM
Integra Management
Corporation, AAMC
Mount Arlington, N.J.



Lesley Stoeffler, CMCA
Community Management
Services, Inc.
Indianapolis



*Liaison to CAI Community
Association Managers Council*
Melissa Guyott, CMCA, AMS, PCAM
Ponderosa Community Management
Spokane, Wash.

SPECIAL THANKS

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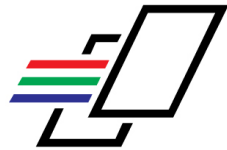
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CHARGING LOUNGE



NAME BADGES



ROOM KEY CARD



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