

2024

COMMUNITY ASSOCIATION

Law Seminar

FEB. 14-17 | LAS VEGAS, NEVADA

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AGENDA

OPTIONAL HALF-DAY PROGRAMMING

Wednesday, February 14, 2024

1:00 – 2:15pm | Education Session

Inspiring the Next Generation of Community Association Law Partners

How do established community association practitioners create a firm culture that attracts and mentors talented lawyers? How can junior community association practitioners focus their time and efforts and develop an ownership mindset critical to moving from associate to owner or partner? This program explores the development of sustainable community association law firms and healthy professional relationships among attorneys from multiple perspectives.

Daniel C. Heaton, Esq., Nordberg|DeNichilo, Ladera Ranch, California

Kayleigh B. Long, Esq., Hirzel Law, Farmington, Michigan

John P. Gill, Esq., Hughes Gill Cochrane Tinetti, Walnut Creek, California

2:30 – 5:00pm | Education Session

Evaluating the Stages in your Community Association Law Career Plan

Career planning is essential to the success of your legal practice – regardless of which stage of your law career you're at. Presenters discuss their personal experiences and unique challenges faced when creating a succession plan and provide tips you can take into action right away.

Edmund A. Allcock, Esq., CCAL fellow, Allcock & Marcus, LLC, Braintree, Massachusetts

Julie McGhee Howard, Esq., CCAL fellow, NowackHoward, LLC, Atlanta, Georgia

Anthony Rafel, Esq., CCAL fellow, Rafel Law Group PLLC, Rafel Law Group PLLC, Seattle, Washington

Amy K. Tinetti, Esq., CCAL fellow, Hughes Gill Cochrane Tinetti, Walnut Creek, California

Resources: [Creating Community Association Law – Pring Book True Tales from Early Pioneers](#)

LAW SEMINAR PROGRAMMING

Thursday, February 15, 2024

12:10 – 1:10pm | General Session

Wayne Hyatt Lecture Series: Purpose: Design a Community and Change Your Life with Gina Bianchini

Author of **Purpose: Design a Community and Change Your Life**, Founder of Mightybell; Co-Founder and former CEO of Ning; Serial Entrepreneur; Social media and capital investment thought-leader; Columnist & blogger.

Gina Bianchini is the CEO and Founder of Mighty Networks, where creators, entrepreneurs, and brands use cultural software to build digital communities. She's also the creator of Community Design™, a proven strategy framework for understanding and growing communities online and in the real world.

Over 8,000 people have taken her Community Design™ Masterclass where they learn how to build a community so valuable you can charge for it, and so well-designed it essentially runs itself. She led Ning as CEO from its inception in 2004 to March 2010 as an exponentially growing top 100 global website and one of the most valuable start-ups in Silicon Valley with close to 50 million registered users and touching 90 million people around the globe each month.

Bianchini's book ***Purpose: Design a Community and Change Your Life*** is a thought-provoking and actionable book. Gina offers a step-by-step guide to finding your purpose and translating it into action through the power of community and new approaches to technology. She offers a unique take on purpose discovered through her popular Community Design(TM) Masterclass that has helped thousands of people crystalize their purpose and deliver impact-one community at a time.

She has been featured in Fast Company, Wired, Vanity Fair, Fortune, Wall Street Journal, Bloomberg, and The New York Times. She has appeared on CNBC, CNN, and Charlie Rose. She grew up in Cupertino, California, graduated with honors from Stanford University, started her career in the High Technology Group at Goldman, Sachs & Co., and received her MBA from Stanford Business School.

1:30 – 2:40 pm | Concurrent Sessions

Communications Counts: Teaching Clients a More Effective and Ethical Way (ETHICS)

Every attorney has a few clients who don't understand the value of our time, legal obligations, or rules of ethics. What if you could teach them how to communicate with you so they save money and time? Wouldn't this make you and the client happy? This presentation will focus on attorneys' ethical obligations regarding client communication and provide tools to teach clients how to effectively communicate with you.

Elina Gilbert, Esq., CCAL fellow, Altitude Community Law P.C., Lakewood, Colorado
Augustus Shaw, IV, Esq., CCAL fellow, Shaw & Lines, LLC, Phoenix, Arizona

Resource: [Best Practices: Ethics](#)

Hard Market How-to: Building an Alliance to Overcome Insurance Challenges

Given current insurance market conditions, it's imperative that community association insurance professionals and attorneys form an alliance to assist clients. This session will cover new underwriting criteria to cancel or not renew an insurance policy, the limited options community associations have, and how attorneys and insurance brokers can partner to manage this insurance crisis.

Charlotte Allen, CIRMS, Socher Insurance Agency, Inc., Pleasanton, California
Brendan P. Bunn, Esq., CCAL fellow, Chadwick, Washington, Moriarty, Elmore & Bunn, P.C., Fairfax, Virginia
Jessica Knutsen, CIRMS, USI Insurance Services, Falls Church, Virginia

Resources:

1. [CONDOMINIUM DECONVERSION/TERMINATION STATE STATUTES](#)
2. [INSURANCE COVERAGE TRENDS IN COMMUNITY ASSOCIATIONS](#)
3. [Insurance How Community Associations Protect Themselves](#)
4. [Risk Management, 2nd Ed. How Community Associations Protect Themselves](#)

HOA Reconstruction Projects: Considerations for General Counsel

Your association's construction defects case has been successfully resolved. Now what? This panel will discuss the different phases of successful large-scale reconstruction projects including construction delivery method options, the bidding process, contract negotiation, communications, oversight, and closeout.

Troy Isaacson, Esq., Isaacson Law, Las Vegas Nevada
Jeffrey Kerrane, Esq., CCAL fellow, Kerrane Storz, PC, Broomfield Colorado
Adam Maldonato, Esq., Reconstruction Experts, Irving Texas

Resources:

1. [Bids & Contracts How to Find the Right Community Association Professional](#)
2. [CONSTRUCTION DEFECTS/WARRANTIES](#)
3. [Home and Condo Defects](#)

3 – 4:10 pm | Concurrent Sessions

Good in the Neighborhood: Powerful Agents of Social Change (ETHICS)

Community associations are frequently in the news for all the wrong reasons, but they also have the power to be an important part of addressing discrimination, enabling homeownership, and creating communities that welcome all. This presentation will cover the history of community associations and some of the most problematic issues they face today; how they can combat discrimination; and how attorneys representing community associations can lead that charge.

Valerie Farris Oman, Esq., Condominium Law Group, PLLC, Seattle, Washington

Susan Tarley, Esq., CCAL fellow, Tarley Robinson, PLC, Williamsburg, Virginia

Melissa Ward, Esq., CCAL fellow, Adams | Stirling PLC, San Francisco, California

Resources:

1. [Best Practices: Community Harmony & Spirit](#)
2. [Diverse and Inclusive Communities Guide](#)

End Times: Terminating a Common Interest Community

What economic factors cause a community association to pursue termination? What common processes govern termination? What various factors might a community need to overcome? Learn about the termination process for various types of common interest communities and how the obligations and assets are dealt with afterward.

Robert Diamond, Esq., CCAL fellow, Reed Smith, LLP, Mc Lean, Virginia

Scott Sandler, Esq., CCAL fellow, Sandler & Hansen, LLC, Middletown, Connecticut

Todd Sinkins, Esq., CCAL fellow, Rees Broome, P.C., Tysons Corner, Virginia

Resources:

1. [CONDOMINIUM DECONVERSION/TERMINATION STATE STATUTES](#)
2. [Guiding Principles for Community Association Governing Documents A Resources for Lawyers](#)

Robert's Rules Rock: Parliamentary Procedure Survival Skills for Attorneys

Join Jim Slaughter, a certified professional parliamentarian, a CCAL past president, and author of four books on running association meetings, for a lively and interactive look at running better meetings. Learn how to properly use parliamentary procedure and Robert's Rules of Order to make meetings shorter, legal, and efficient. Learn what rules to follow, the order of business, minutes, board versus membership meeting procedures, motions, voting, tips for virtual meetings, and parliamentary resources.

Jim Slaughter, Esq., CCAL fellow, Law Firm Carolinas, Greensboro, North Carolina

Resources:

1. [Notes and Comments on Robert's Rules, Fifth Edition](#)
2. [Robert's Rules of Order Fast Track The Brief and Easy Guide to Parliamentary Procedure for the Modern Meeting](#)
3. [Robert's Rules of Order Newly Revised in Brief, 3rd edition](#)
4. [Robert's Rules of Order Newly Revised, 12th edition](#)

CIRMS Insurance Masters Program: Complex Liability Claims - LET'S MAKE A DEAL

this program will feature the second annual collection of unusual insurance claim stories, presented in an engaging and interactive format. The focus will be on complex liability claims. Presenters will delve into case studies that highlight the complicated relationship between the association's General Liability and Directors & Officers/Employee Practices Liability coverage, as well as the management company's Errors & Omissions and Employee Practices Liability insurance. This program promises to be an insightful and valuable exploration of insurance scenarios.

Christa Brady, AMS, PCAM, CIRMS, USI Insurance Services, Falls Church, Virginia

Adam Collins, CIRMS, Ian H. Graham Insurance, Sherman Oaks, California

Karen O'Connor Corrigan, CIRMS, O'Connor Insurance Agency, St Louis, Missouri

Kevin Davis, CIRMS, Kevin Davis Insurance Services, Los Angeles, California

4:25 – 5:55pm | General Session

Case Law Update Part I

Community association case law takes center stage. Be there for one of the most popular Law Seminar sessions, and get a first look at the year's most significant court cases and developments shaping community association law with this fast-paced, entertaining presentation. The collection features new cases that have been filed, and major developments in

ongoing cases, during 2023. Connect with your community association law peers for a brilliant review of statutes and regulations revealing important developing trends in community association governance.

Brian Morgan, Esq., CCAL fellow, Maxwell & Morgan, P.C., Mesa, Arizona

Hope Derby Carmichael, Esq., CCAL fellow, Jordan Price Wall Gray Jones & Carlton, PLLC, Raleigh, North Carolina

Friday, February 16, 2024

8 – 9:10 am | Concurrent Sessions

Sanctioned or Disbarred? A Top 10 List (ETHICS)

Let's explore the situations attorneys engage in that get them in hot water. We'll review fact patterns from actual cases from across the country as well as reference specific state ethical codes for each of the activities on the top 10 list.

Adam M. Beaudoin, Esq., CCAL fellow, Ward and Smith, P.A., Wilmington, North Carolina

Cynthia A. Jones, Esq., CCAL fellow, Sellers, Ayers, Dortch & Lyons P.A., Charlotte, North Carolina

Election Nightmares: Managing the Rules, Results, and Recalls

Come explore the laws and requirements needed to successfully hold elections and recalls. This session will take a deep dive into board nominee qualifications, election by acclamation, proxies, the use of inspector of elections, virtual elections, and ballot harvesting. We will discuss the importance of election rules and how best to advise clients to ensure transparency and compliance with governing documents and state law. We'll compare legislation and discuss trends we see in the election process for common interest developments around the nation.

Brian Moreno, Esq., CCAL fellow, Brian D. Moreno Law Corporation APC, Los Angeles, California

Lisa Tashjian, Esq., CCAL fellow, Beaumont Tashjian, Agoura Hills, California

Resources:

1. [Meetings & Elections](#)
2. [ELECTRONIC VOTING AND VIRTUAL MEETINGS](#)

Need to Know Now: Navigating the Corporate Transparency Act

Over the past few decades, our country has apparently become a haven for money laundering activities. To combat illegal activities, Congress adopted the Corporate Transparency Act, which mandates the creation of a national database for most legal entities including community associations. Learn how the failure to comply could land a board member in prison and how it impacts legal practitioners and management companies. Additionally, HUD and the interpretation of State laws has resulted in limits on the use of criminal background checks as it relates to occupancy restrictions (especially for sex offenders).

Todd Billy, Esq., The Community Association Lawyers, Saint Louis, Missouri

Daniel Miske, Esq., CCAL fellow, Husch Blackwell LLP, Milwaukee, Wisconsin

Danielle Wang, Esq., Sands Anderson, PC, Williamsburg, Virginia

Resource: [Corporate Transparency Act: Community Associations Prepare and Engage](#)

CIRMS Insurance Masters Program: Community Association Risk Management & Insurance Case Law Review

The presentation will go beyond the basics of community association risk management and insurance by examining and reviewing legal issues that have developed through case law that affect all risk management and insurance providers in the community association marketplace. The review will look at as many as 10 cases across the U.S. Additional discussion will be included regarding substantive issues raised in the case law that may impact the administration of agency practice and/or evaluation of risk for association insureds.

Jennifer L. Wojciechowski, Esq., CIRMS, CCAL fellow, Community Association Underwriters of America, Inc., Yardley, Pennsylvania

9:30 – 10:40 am | Concurrent Sessions

Attorney Wellness: Connecting Our Practice, Our Communities, and Ourselves (ETHICS/Mental Health)

Come look through the lens of connection and confronting anxiety, depression, and burnout. Three community association lawyers will encourage their peers to focus on their individual wellness rather than falling into the familiar role of counselor to others. Participants will learn about the unique legal mind and exercises to manage stress. This presentation will build on prior wellness sessions. Ethics CLE credits will be requested.

Alexis Firehawk, Esq., Carpenter, Hazlewood, Delgado & Bolen, LLP, Tempe, Arizona

David Graf, Esq., CCAL fellow Moeller Graf, P.C., Englewood, Colorado

Resource: [STATE BAR ASSOCIATION MENTAL HEALTH AND ASSISTANCE PROGRAMS AND RESOURCES](#)

Stranger Things: Tales and Takeaways from the Fair Housing Act

Community association attorneys need to understand the key legal issues surrounding emotional support animals and other reasonable accommodations. This program will focus on the reasonableness of an accommodation, the connection between a person's disability and an emotional support animal, the ability of a board to vote on its legitimacy, and how attorneys and clients can effectively navigate these disputes without falling into liability traps.

Marshal Granor, Esq., CCAL fellow, Granor & Granor, PC, Horsham, Pennsylvania

Steven Sugarman, Esq., CCAL fellow, Gawthrop Greenwood, PC, West Chester, Pennsylvania

Resources:

1. [APRIL IS FAIR HOUSING MONTH](#)
2. [FAIR HOUSING](#)

The Neighbor Did What? Effectively Handling Discrimination Investigations

Since 2016, there has been a big increase in neighbor-to-neighbor complaints. That's when the U.S. Department of Housing and Urban Development changed rules requiring community associations to investigate disputes that may involve unlawful discrimination. This session will provide proactive solutions to reduce the number of complaints and incidences of discrimination, practical solutions to prepare for complaints, the delicate process of investigating these claims on behalf of clients.

Melissa Doolan, Esq., The Travis Law Firm, PLC, Phoenix, Arizona

Tim Flanagan, Esq., Flanagan Law, APC, San Diego, California

Resources:

1. [CAI's Commitment to Black History Month and the Pursuit of Housing Equality](#)
2. [Creating Harmony in Diverse Communities](#)
3. [Diverse and Inclusive Communities Guide](#)
4. [REMOVE DISCRIMINATORY RESTRICTIVE COVENANTS](#)

CIRMS Insurance Masters Program: Apocalypse Now Part 1: Preparing for (or Navigating) the Worst Case Property Insurance Market

Panel will discuss their experiences advising clients of risk management and insurance options and liaising with carriers against the backdrop of increasingly deteriorating market conditions. Topics will include FAIR Plan considerations, funding and risk management challenges, occasionally hostile interactions with clients, state-level advocacy efforts, and some potentially controversial solutions.

Dawn Becker-Durnin, CIRMS, Acrisure, Fairfield, New Jersey

Adam Clarkson, Esq., CCAL fellow, Clarkson McAlonis & O'Connor, P.C., Las Vegas, Nevada

Patrick Prendiville, CIRMS, Prendiville Insurance Agency, Dana Point, California

Resources:

1. [INSURANCE COVERAGE TRENDS IN COMMUNITY ASSOCIATIONS](#)
2. [Insurance How Community Associations Protect Themselves](#)
3. [RISK MANAGEMENT AND INSURANCE FOR COMMUNITY ASSOCIATIONS](#)
4. [Risk Management, 2nd Ed. How Community Associations Protect Themselves](#)

11:00 am – 12:10 pm | Concurrent Sessions

Staying Relevant in the Age of ChatGPT: Embracing Modern Technology (ETHICS)

While artificial intelligence is not expected to replace in-depth legal analysis, it is materially changing the process for answering community inquiries, drafting correspondence, and creating written documents. In this session, we will discuss the benefits of using AI in your legal practice, highlight the ethical considerations and potential liability of using and relying upon AI, and provide a few tips and tricks.

Matt D. Ober, Esq., CCAL fellow, Richardson|Ober, LLP, Pasadena, California

Chad J. Toms, Esq., Whiteford, Taylor & Preston, LLP, Wilmington, Delaware

Nicholas Bartzen, Esq., Bartzen Rosenlund Kasten, LLC, Chicago, Illinois

Association Directors and Indemnification: Obligations and Limitations

When volunteering for a board role, the promise of indemnity may be offered, but it is not without limitations. Is the association always required to defend or indemnify a director? Join a discussion on the limitations, the issues raised by dual capacity, conflicts of interest between board members and the association, insurance issues, high deductibles, and various state statutes and regulations.

Steven S. Weil, Esq., CCAL fellow, Berding & Weil, LLP, Walnut Creek, California

Jennifer L. Wojciechowski, Esq., CIRMS, CCAL fellow, Community Association Underwriters of America, Inc., Yardley, Pennsylvania

Thomas M. Ware, Esq., CCAL fellow, Kulik Gottesman Siegel & Ware LLP, Sherman Oaks, California

Resource: [Conflicts of Interest How Community Association Leaders Honor Their Duties](#)

Fair Housing Frontiers: Models of Liability

Attorneys and insurance professionals are expected to understand and properly apply state and federal fair housing laws. Many don't understand how far the scope of fair housing liability can reach. We'll discuss the nuts and bolts of liability and how to avoid fair housing issues from the start.

Daniela Burg,

Lydia Linsmeier, Esq., CCAL fellow, Carpenter, Hazlewood, Delgado & Bolen, LLP, Tempe, Arizona

Jason Smith, Esq., Smith & Wamsley, PLLC, Tucson, Arizona

Resources:

1. [APRIL IS FAIR HOUSING MONTH](#)
2. [FAIR HOUSING](#)

1:10 – 2:40 pm | General Session

Case Law Update Part 2

Community association case law takes center stage. Be there for one of the most popular Law Seminar sessions, and get a first look at the year's most significant court cases and developments shaping community association law with this fast-paced, entertaining presentation. The collection features new cases that have been filed, and major developments in ongoing cases, during 2023. Connect with your community association law peers for a brilliant review of statutes and regulations revealing important developing trends in community association governance.

Ursula K. Burgess, Esq., CCAL fellow, Rees Broome, P.C., Tysons Corner, Virginia

Kelly G. Richardson, Esq., CCAL fellow, Richardson|Ober, LLP, Pasadena, California

3:00 – 4:10 pm | Concurrent Sessions

Security Services: What Do Community Associations Have a Duty to Protect?

From contractual obligations to current trends and emerging technology, insurance implications, and privacy, community associations have a lot to consider when it comes to security. This session will cover liability, corporate governance strategies, and best practices.

Lauren DeVoe, Esq., Morris DeVoe, Midvale, Utah

Bill Gourley, Esq., NowackHoward, LLC, Atlanta, Georgia

Maria Kao, Esq., Briscoe, Ivester & Bazel, LLP, San Francisco, California

Resources:

1. [Best Practices: Community Security](#)
2. [Safety First - Print Book Evaluating Risks and Developing Practical Solutions](#)

Preparing for the Next Career Chapter

Are you thinking about what's next for your legal career? Dream of selling your practice, slowing down, moving to a desert island, or pivoting into a judgeship, faculty, or in-house position? Learn the keys to successful transitions, unexpected struggles, and mental obstacles from panelists who have transitioned to the next chapter. This session will have lots of opportunities for questions and honest, open answers.

Stephen Marcus, Esq., CCAL fellow, Allcock & Marcus, LLC, Braintree, Massachusetts

Marc Markel, Esq., CCAL fellow, Roberts Markel Weinberg Butler Hailey PC, Houston, Texas

Laura Sanchez, Esq., Aurora, Colorado

Resource: [Creating Community Association Law - Print Book True Tales from Early Pioneers](#)

Shielding Ourselves When We Become the Targets: How to Protect Lawyers and Law Firms from Successful Attacks

Law firms and lawyers are litigation targets now more than ever before. Lawyers are finding everyday actions in practicing law can make them the subject of lawsuits. In May 2020, Carpenter, Hazelwood, Delgado & Bolen, LLP was targeted in a class action lawsuit filed in federal court. The suit alleged the firm violated the Federal Credit Reporting Act. The law firm successfully prevailed after a three-year battle against an aggressive homeowner law firm. Community association lawyers also are being targeted by advocacy groups looking to “protect” homeowners. Owners within associations we represent are filing bar complaints against association attorneys and disparaging lawyers in open board meetings. Being the subject of these attacks can affect how attorneys represent clients. It can make them fear being an advocate can subject them to a claim and tarnish reputations. Join presenters as they walk attendees through one firm’s litigation journey as a defendant, another attorney’s fight against bar complaints, and a third attorney’s ambush by an owner during an open board meeting. Through these stories and lessons, presenters will provide tips on how lawyers and their firms can protect themselves and not fall into a trap or be controlled by fear.

Scott Carpenter, Esq., CCAL fellow, Carpenter, Hazlewood, Delgado & Bolen, LLP, Tempe, Arizona

Gabriella Comstock, Esq., CCAL fellow, Keough & Moody, P.C., Naperville, Illinois

Theresa Torgesen, Esq., CCAL fellow, Sage Community Law, PLLC, Seattle, Washington

CIRMS Insurance Masters Program: Apocalypse Soon Part 2: Termination and Dissolution of a Community Association: Risk Management and Insurance Issues

Tressa Bishop, CIRMS, Alliant Insurance Services, Inc., Greenwood Village, Colorado

Michelle Baldry, RS, Reserve Advisors, LLC, Arlington, Virginia

Clifford J. Treese, CIRMS, Association Consulting, Inc. Mountain House, California

Resources:

1. [CONDOMINIUM DECONVERSION/TERMINATION STATE STATUTES](#)
2. [Insurance How Community Associations Protect Themselves](#)
3. [RISK MANAGEMENT AND INSURANCE FOR COMMUNITY ASSOCIATIONS](#)
4. [Risk Management, 2nd Ed. How Community Associations Protect Themselves](#)

4:20 – 5:40 pm | General Session

Panel of Pundits

Moderated by David Graf, Esq., CCAL fellow, Moeller Graf, P.C., Englewood, Colorado

Panel: Tiago Bezerra, Esq., Chadwick, Washington, Moriarty, Elmore & Bunn, P.C., Fairfax, Virginia

Leah Burton, Esq., CCAL fellow, Steptoe & Johnson PLLC, Plano, Texas

Edward Hoffman, Esq., CCAL fellow, Hoffman Law LLC, Montgomeryville, Pennsylvania

Julie McGhee Howard, Esq., CCAL fellow, NowackHoward, LLC, Atlanta, Georgia

Saturday, February 17, 2024

9:00 – 10:10 am | Concurrent Sessions

Charging Ahead: Legal Issues Created by Electric Vehicles and Solar

What’s the national landscape on electric vehicle charging station regulations? What current and future issues and potential resolutions do you need to know about? Come understand the engineering, legal, and insurance consequences when dealing when solar energy systems and electric vehicles within community associations.

Christopher Flythe, PE, RS, Project Engineer, Raleigh, North Carolina

Andrew Bateman, TriSure, Raleigh, North Carolina

Cyrus Koochek, Esq., SwedelsonGottlieb, Los Angeles, California

Resources:

1. [ELECTRIC VEHICLE CHARGING STATIONS](#)
2. [Is Your State EV Ready? Electric Vehicle \(EV\) Ready Issue Brief](#)

Deep Impact: Exploring the Benefits and Challenges of Social Media

Social media has revolutionized communications but poses challenges for community associations. This presentation explores the impacts of social media from expanding member access to community information (the good) to harassment and defamation (the bad). Attorneys will gain insights and practical strategies for counseling associations on the fine line

between freedom of speech and defamation, managing association social media use, dealing with potential fair housing issues, and fostering positive online experiences. Valuable tips for drafting social media policies also are discussed.

W. Alexander Noland, Esq., CCAL fellow, Noland Law PC, San Francisco, California

Amy Smith Esq., Makower Abbate Guerra Wegner Vollmer PLLC, Farmington Hills, Michigan