



Leaders at the Helm

Charting the Course

Virginia Leadership Retreat

VIRGINIA LEADERSHIP RETREAT

Community Associations Institute

August 3-6, 2017

"Leaders at the Helm – Charting the Course"

In early August, a fleet of Community Association Industry Leaders will cruise towards The Omni Homestead Resort in Hot Springs, Virginia for the Virginia Leadership Retreat, an extended weekend of education, networking and fun with other Industry Professionals. For the past eight years, Leaders from throughout Virginia and the Washington Metropolitan area have gathered to participate in networking events and advanced educational seminars tailored to the changes in legislature that affect our region, as well as the challenges faced by our industry professionals. Whether you are coming from Washington DC, Maryland, or Virginia, the Virginia Leadership Retreat is an affordable and local opportunity to earn education credits – all while having some lively fun in the process.

Every year the Retreat boasts its own flavor and theme, and this year we are putting a nautical spin on the event and inviting industry Leaders to take the helm. Get your sea legs ready and come aboard to network with professionals from across the region. There is no better way to connect with colleagues than by charting the golf course together in the morning, setting sail on the Lazy River in the afternoon, and chilling out to some Yacht Rock to finish out the evening after dining on the fine cuisine in the galley. There is never a dull moment at the VLR, but make sure to spend a little time outside of the Retreat's schedule to take advantage of all that is offered at The Homestead. The Resort offers activities such as hiking, canoeing, mountain biking, paintball, archery, horseback riding, and many more. Or would you prefer to lounge on the deck and relax during your stay? Try the adults-only Serenity Garden Pool, or enjoy a vast array of health and wellness treatments, massages, and salon services at the Spa.

Intrigued? Please continue reading and join us in Hot Springs this year. We are inviting all industry professionals to join us for "Leaders at the Helm – Charting the Course" in August and want to see you there. Don't miss out!

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Tentative Retreat Schedule 2017

(subject to change prior to event)

Thursday, August 3, 2017

1:00-3:00 p.m.	VLR REGISTRATION
1:00 p.m. (and all afternoon)	MINI-GOLF TOURNAMENT AND ENJOY THE RESORT
3:00-4:00 p.m.	VLR BINGO
5:00-7:00 p.m.	VLR "ANCHORS AWEIGH" COCKTAIL HOUR

Friday, August 4, 2017

9:30 a.m.	VLR GOLF TOURNAMENT
10:30-12:30 p.m.	EDUCATION SESSION
12:00-4:00 p.m.	REGISTRATION
1:30-2:45 p.m.	EDUCATION SESSION
3:00-4:00 p.m.	CRAFT BEER TASTING
3:00-4:00 p.m.	DRINK MIXOLOGY
5:00-7:00 p.m.	"WELCOME ABOARD" RECEPTION

Saturday, August 5, 2017

7:00-8:30 a.m.	BREAKFAST
8:00-10:00 a.m.	REGISTRATION
8:30-9:45 a.m.	CHOICE OF THREE EDUCATION SESSIONS
10:00-11:30 a.m.	GENERAL SESSION – KEYNOTE ADDRESS
11:45 a.m.-1:00 p.m.	CHOICE OF THREE EDUCATIONAL SESSIONS
1:00-2:15 p.m.	LUNCH WITH EDUCATION SESSION
6:30-9:00 p.m.	VLR CELEBRATION DINNER

Sunday, August 6, 2017

7:00-8:30 a.m.	BREAKFAST
9:00-10:30 a.m.	EDUCATION SESSION
10:30 a.m.	VLR CLOSING COMMENTS

Professional Photography provided by



Come Aboard – We're Expecting You!!

Retreat "Extra" Opportunities

In addition to the great education, the Virginia Leadership Retreat provides a variety of ways to relax, energize, network, and just plain have fun! Those who arrive on Thursday (or earlier) can take advantage of an impressive array of recreational activities that The Homestead provides, as well as some extra special activities the Committee has planned for early arrivals. The Resort added numerous amenities in 2013, which included a new spa & wellness center, innovative dining experiences, a lazy river with water slides, as well as a beautiful and challenging miniature golf course. And new to The Homestead in 2017 are the Ridge Runner Zip Tour and the Red Tail Racer, exhilarating zipline adventures that offer breathtaking views of the surrounding Allegheny Mountains. Fun! Fun! Fun! So, whether you choose to bask in The Homestead's charm and relax your days away or if you prefer to be entertained, you will not be disappointed.

Golf Tournament

Get a crew together for one of the most popular VLR activities – the Friday morning Golf Tournament. Join fellow conference attendees for a day of golf on the resort's famous Old Course with networking, lunch, and fun. If you are a golfer, you will not want to miss the event. The competition is on for the coveted first place bragging rights (and trophies!). It promises to be an event to remember. Register by June 30th for Early Bird pricing.

Early Bird Activities

As in previous years, the VLR will be hosting group activities for your enjoyment and networking pleasure. Make sure you arrive at The Homestead early on Thursday to participate in the Fifth Annual Mini-Golf tournament - pick up your free passes at Thursday's early bird registration. Also, Thursday arrivals will be just in time for VLR Bingo and the pre-event Anchors Aweigh Cocktail Hour held in the Tower Suite.

Craft Beer Tasting

Back by popular demand, the VLR will once again offer the Craft Beer Tasting featuring the Blue Mountain Brewery. Enjoy an informal talk and tasting from Taylor Smack, the founder of Blue Mountain Brewery, owner of South Street Brewery and former head brewer of the original Goose Island Brewery location in Chicago. Scheduled on Friday afternoon, it's the perfect way to refresh your palate after a day on the links or get ramped up for the Welcome Aboard Reception later that evening. The tasting is limited to 40 attendees, so register early to reserve your spot. Must be 21 years or older to attend.

Drink Mixology

Always a VLR favorite, Drink Mixology will be back again this year in a new format. Also scheduled for Friday afternoon, it will be focused on audience participation and competition among tables. We will be creating and sampling yacht-ready cocktails such as the Hand Shaken Daiquiri, Spicy Paloma, Jungle Bird, and Blood Orange Smash. Limited to 40 attendees, so register early. Must be 21 years or older to attend.

Family Fun Activities

Bringing a friend or your family? While you are attending classes on Saturday, team members of all ages will be entertained! They can enjoy any of the wonderful amenities that The Homestead Resort offers, and an exclusive movie matinee where VLR guests will have the Homestead Theater all to themselves! Also, the VLR has special pricing on the Omni Homestead Activity Punch Cards. Please inquire at Registration if you are interested in purchasing these for your family.

Not sure what to do with the kids while you are attending events or classes? The Homestead provides Kids Club and private babysitting. Both can occupy your child all day and for certain time periods in the evening. Contact The Homestead for pricing and availability.

VIRGINIA LEADERSHIP RETREAT

2017 Registration Form

August 3 — August 6, 2017 · The Omni Homestead Resort



In order for us to better serve you, please ensure you complete BOTH sides of this registration form.

COMPANY NAME: _____

1 st Registrant	Designation(s)	Phone Number for Text Alerts	E-Mail Address
2 nd Registrant	Designation(s)	Phone Number for Text Alerts	E-Mail Address
3 rd Registrant	Designation(s)	Phone Number for Text Alerts	E-Mail Address
4 th Registrant	Designation(s)	Phone Number for Text Alerts	E-Mail Address

Company Address/City/State/Zip Code _____

Business Telephone Number _____

REGISTRATION FOR MANAGER MEMBERS:

Includes all education sessions, Early Bird Activities, Friday Welcome Reception, Saturday Breakfast, Lunch & Dinner & Sunday Breakfast.
Non CAI Manager members will be charged an additional fee.

	By June 30 th	After June 30 th
1st Registrant	\$250	\$325
2nd & Additional Registrants	\$215	\$325

From same firm/association. Discount applies only when registrants are submitted together (CAI Members only).

**Dietary Restrictions? Please send an email to vlrcommittee@gmail.com. We are happy to work with you.*

REGISTRATION FOR CAI BUSINESS PARTNER MEMBERS:

Limited to first 40 Companies. Includes education sessions as space permits, Early Bird Activities, Friday Welcome Reception, Saturday Breakfast, Lunch & Dinner and Sunday Breakfast. **Registration fee includes TWO Company Representatives.** All Business Partners will have the opportunity to display their information on a 3' x 4' draped table top during the day Saturday.

	By June 30 th	After June 30 th
Two Company Representatives	\$725	\$800
3rd & Additional Registrants	\$300	\$375

From same firm. Discount applies only when registrants are submitted together (CAI Business Partner Members Only).

☐ Please check here if your company would like to utilize the 3'x4' table top .
 Electricity is **NOT** available.

REGISTRATION FOR ADDITIONAL ADULT GUESTS: Includes Friday Welcome Reception, Saturday Breakfast & Dinner and Sunday Breakfast. Unregistered guests may not attend these events. Please indicate here **ONLY** if you need additional tickets for guests. Adult guest tickets are reserved for spouses/friends. Adult guest tickets may not be purchased for managers or CAI Business Partner Members.
Guest tickets may be purchased prior to June 30th for \$210 and \$250 after June 30th.

 Name(s) of Adult Guest(s):

 Name(s) of Adult Guest(s):

 Name(s) of Adult Guest(s):

 Name(s) of Adult Guest(s):

PAYMENT POLICY: No registration will be processed without full payment. The Virginia Leadership Retreat accepts checks in U.S. Dollars, American Express, Discover, MasterCard and Visa for your convenience. Please make checks payable to Virginia Leadership Retreat or CAI. Please forward payments to: **Virginia Leadership Retreat c/o CVC-CAI, P.O. Box 5118, Midlothian, VA 23112. If paying by credit card, please complete ALL information on reverse side of this form.**

PRIVATE PARTY POLICY: Hospitality suites and hosted events must be approved by the Virginia Leadership Retreat and CAI. Only hosted events approved or sponsored by the Virginia Leadership Retreat and CAI are permitted during official conference activities.

CANCELLATION POLICY: Registration Fees are non-refundable. All tickets purchased onsite are non-refundable.

SUITCASTING POLICY: The Virginia Leadership Retreat and CAI have a no-tolerance policy regarding "suitcasing", which describes the practice of non-registered companies or individuals soliciting sales and/or representing their services or soliciting conference participants for conflicting social activities. Violators of this policy will be ejected from the show and charged the business partner registration rate (\$800), which must be paid prior to registering as an attendee, exhibitor or sponsor at any future Virginia Leadership Retreat, CAI conference or event.

TEXT MESSAGING: Again this year we will be sending special notifications of schedule, locations and events via text message. If you wish to be contacted this way during the VLR, please make sure to include your phone number(s). Please provide telephone numbers of all registrants who wish to be contacted. Please note that standard text messaging rates will apply and the message recipient will be responsible for applicable text message charges according to your cell plan.



GOLF TOURNAMENT REGISTRATION: Registration includes a boxed lunch, greens fees and a cart. Additional snacks and beverages are available for purchase at the golf course. The Golf Tournament is on Friday, August 4, 2017 beginning at 9:30AM and is available on a first come, first paid basis. For more information about The Homestead's Old Course, please visit www.thehomestead.com or call 1-540-839-1766. **Registration fee is \$130 if paid by June 30th or \$175 if paid after June 30th.**

Name of Golfer _____ Phone Number for Text Alerts _____

Name of Golfer _____ Phone Number for Text Alerts _____

Name of Golfer _____ Phone Number for Text Alerts _____

Name of Golfer _____ Phone Number for Text Alerts _____

CRAFT BEER TASTING: On Friday, August 4, 2017 you will join others in a Craft Beer Tasting class. Open to all VLR Registrants and guests. Participants must be 21 or older. **Registration fee is \$45/person.**

Name of Participant _____ Phone Number for Text Alerts _____

Name of Participant _____ Phone Number for Text Alerts _____

Name of Participant _____ Phone Number for Text Alerts _____

Name of Participant _____ Phone Number for Text Alerts _____

DRINK MIXOLOGY WITH A TWIST: On Friday, August 4, 2017 you will join others competing to make better cocktails than the next table. Create and sample in this interactive event which is open to all VLR Registrants and guests. Participants must be 21 or older. **Registration fee is \$45/person.**

Name of Participant _____ Phone Number for Text Alerts _____

Name of Participant _____ Phone Number for Text Alerts _____


Name of Participant _____ Phone Number for Text Alerts _____

Name of Participant _____ Phone Number for Text Alerts _____

SPECIAL "EARLY BIRD" EVENTS: Arrive at The Homestead on Thursday, August 3, 2017 and join in the Networking Fun! The VLR has planned several events throughout the day on Thursday, August 3rd and Friday, August 4th to start the retreat out on a lively note. Join us for fun and prizes while getting to know other Retreat attendees. Guests and family members are welcome to attend these events as well as a special private matinee movie on Saturday in The Homestead Theater. All activities are FREE to conference attendees and their guests who pre-register. Please let us know which of these events you will be attending by sending an email to the committee at: vlrcommittee@gmail.com. Registration for the Full Conference and Special Events will be on Thursday morning before the activities begin. **Please note that you MUST pre-register.**

ROOM BLOCK INFORMATION: To make hotel reservations, please follow this link: <http://www.omnihotels.com/hotels/homestead-virginia/meetings/virginia-leadership-retreat> or complete the online form on any of the Virginia Chapter websites. If you have questions, please call 866-354-4653. The "VLR Rate" is \$260.00 plus \$15 resort fee & applicable taxes. This year the room rate includes: Valet Parking, Access to the Fitness Center & Indoor Pool, Access to the Family Pool Complex, Daily Newspaper, Nightly Movies in the Historic Theater and Wireless Internet in the Guestrooms & Public Areas. Attendees are responsible for ALL hotel reservations and costs. Please do not include the hotel pricing information on this form.

REGISTRATION OR EVENT	FEE BEFORE JUNE 30	FEE AFTER JUNE 30	SUBTOTAL	TOTAL
1 st Full Conference Manager Registration (non CAI members, please add \$100 per registrant)	\$250 x _____	\$325 x _____	\$ _____	\$ _____
2 nd & Additional Manager Registration (from same firm)	\$215 x _____	\$325 x _____	\$ _____	\$ _____
Business Partner Registration (includes 2 representatives)	\$725 x _____	\$800 x _____	\$ _____	\$ _____
3 rd & Additional Business Partner Registration	\$300 x _____	\$375 x _____	\$ _____	\$ _____
Additional Adult Guest(s)	\$210 x _____	\$250 x _____	\$ _____	\$ _____
Golf Tournament	\$130 x _____	\$175 x _____	\$ _____	\$ _____
Drink Mixology with a Twist	\$ 45 x _____	\$ 45 x _____	\$ _____	\$ _____
Craft Beer Tasting	\$ 45 x _____	\$ 45 x _____	\$ _____	\$ _____
All registrations MUST include payment. VLR accepts checks, American Express, Discover, MasterCard and Visa for your convenience. Forms may be scanned to sdayer_cvccai@verizon.net to secure limited spacing with payment to follow. Please make checks payable to Virginia Leadership Retreat c/o CVC-CAI & mail to P.O. Box 5118, Midlothian, VA 23112. If paying via credit card, you must complete the following:			Grand Total	\$ _____
Name on Card _____		Expiration Date _____		
Credit Card Number _____		CVV Code _____		
Email for receipt _____		Billing Address Zip Code _____		



**VIRGINIA
LEADERSHIP
RETREAT**
Community Associations Institute

2017 Scheduled VLR Educational Sessions

Friday, August 4, 2017

10:30 a.m. – 12:30 p.m.

“Fair Stateroom Assignments” – Fair Housing Act

It is imperative that Association Managers understand Fair Housing laws and the possible repercussions of a Fair Housing complaint on the association and community as a whole. This session will review the legal requirements and helpful guidelines for the Board and association to avoid FHA claims and remain in compliance with the Fair Housing laws. You can stay afloat with your licensing requirements by joining us for this session, which will be facilitated by CICB approved speakers and meets the Fair Housing class requirement for manager licensing/recertification training.

1:30 p.m. – 2:45 p.m.

“You Can’t Handle The Cruise!” – Testifying in Court: Practical Tips on Serving As a Witness

This exciting and engaging session will explain how Managers and Board Members can make effective witnesses in court. This will be an interactive session with attorneys and a few community managers performing a role playing session, which will highlight and illustrate the best practices when testifying in court. If you find yourself in trouble on board, don’t face the Captain without knowing how best to represent your case.

Saturday, August 5, 2017

8:30 a.m. – 9:45 a.m.

“Tacking Maneuvers” – Amending Documents – The Old, The New and The Technical

In the aftermath of *Tvardek v. Powhatan Village*, what must an Association do to properly amend its documents? Words matter and technical requirements reign. The session will provide an overview of the amendment process for both condominium and property owners associations, and explain how to amend documents so that they are amended correctly the first time. The same old amendment maneuvers of yesterday may steer you in the wrong direction.

“Navigating Rough Seas” – Human Resources

This session will provide a general overview on various types of discrimination that are actionable under Title 7, as well as the criteria needed to be eligible for action under Title 7. There are many actionable items which can lead you into rough seas, such as sexual harassment, racial profiling, discrimination based on religion, gender, etc. Attend this session to obtain a general overview of the potential legal pitfalls in Human Resources and how to avoid getting caught up in dangerous waters.

“Avoiding Captain Hook” – Fraud – Detection/Prevention

In today’s world, fraud can occur far too easily. This course will review the three most common types of fraud and subsequently, how to detect and prevent it. Being aware of these three types of fraud and developing methods to identify when fraud is occurring and taking active measures to prevent it can keep you and your organization out of the clutches of Captain Hook.

10:00 a.m. – 11:30 a.m.

Keynote – “Living The Intentional Life”

Are you the author of your destiny or do you let circumstances determine your direction and focus? Are you where you have chosen to be or where you have allowed yourself to be? Only you have the power to create and implement positive change in your life. Learn to identify the artificial limitations you unknowingly allow to direct your personal and professional lives and use the Power of Choice to actively control your fate.

11:45 a.m. – 1:00 p.m.

“All-Inclusive” – Effectively Managing the Loan Process

This session will identify the purpose and role loans play in capital improvement budgets. Common qualifying criteria will be identified and managers will leave with a better understanding of when to consider a loan, how to solicit and compare loan proposals and how to manage the loan process/draws once the loan is in place. Take an all-inclusive cruise into the sunset with us as we help your community plan how to prepare for its short and long-range capital needs.

“Batten Down the Hatches” – Important Insurance Updates – What Community Association Professionals Need to Know Now

Despite the 2015 change to the VA Work Comp Act, the question of whether an Association without employees is legally obligated to purchase Work Comp coverage in Virginia remains unsettled, as Associations now find themselves facing legal sanctions and financial penalties for cancelling existing coverage. This session will update the current interpretation being communicated by the VA Work Comp Commission, as well as the options available to Associations. In addition, we’ll examine and explain the relatively new arena of Cyber Liability exposures to loss, and the new coverage options and risk management approaches available to both management professionals as well as Associations to deal with this very real threat. Finally, this session will take a look at the increasing number of workplace violence incidents touching community associations and the management industry alike, and examine the insurance considerations which must be understood. Join us for this session so you can be prepared when that Category 5 insurance claim hits!

“Making Headway” – Evolution of Communications – From Tin Cans to Smart Phones – Changing the Game

Technology has given us amazing tools to communicate and maintain relationships, yet the quality of communications and human interaction is eroding. How can we keep the technology tail from wagging the dog, deal with insane expectations, connect with others AND save time? It’s time to change the game. Join us at the Captain’s table for some face-to-face communication time.

1:00 p.m. – 2:15 p.m. – Lunch with Education

“This is Your Captain Speaking” – The Power of Positive Leadership

This session will explore the concept of positive leadership, why positive leadership is important, how to achieve it, the key elements of it, the relationship between goals and a strategic plan and the net benefit of positive leaders who inspire positive action within their organization. The session will provide helpful guidance in how to improve your own organization, as well as your client’s organization, the individual’s organizations and overall operations through fostering a greater buy-in and harmony within the groups you are leading. A ship always benefits from a positive Captain at the helm.

Sunday, August 6, 2017

9:00 a.m. – 10:30 a.m.

“Strange Ports of Call” – Unusual Uses

This isn’t your average association. There are many unusual uses in community associations, which are often addressed in your community’s governing documents, but not necessarily always restricted or denied. From AirBnB’s, Group Homes, Day Care and Charging Stations to Therapy Animals, what are the legal issues in restricting or allowing different uses in your association? What is and is not mandated by documents, state law and federal law? Does snuggling with a boa constrictor make you feel better? This interactive session will help guide you through those legal issues when confronted with the uncommon in your common interest community. Whether you’re looking for a turn on a river cruise or a sail around the world, this class has it all for you.

Featuring our Keynote Speaker



The VLR is pleased to welcome our 2017 Keynote Speaker, Charles Marshall

Charles Marshall is one of the most popular humorous motivational speakers speaking today and has over 20 years experience speaking to audiences all over the United States. Each year, Charles travels 100,000 miles to perform in over 100 corporate and civic venues from New York to California. His animated delivery and original observations have captivated over 1,000 audiences over the past two decades, including many Fortune 500 companies.

He is the author of several books including: The Seven Powers of Success and I'm Not Crazy But I Might Be A Carrier. He also has produced and performed two full-length comedy videos, Fully Animated and I'm Just Sayin'!



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