

# 2012 EXPO

*Driving Success*

*Take The Wheel  
To Your Future*

**Friday, July 27, 2012**  
**Saturday, July 28, 2012**

**The Plano Centre,  
2000 E. Spring Creek Parkway  
Plano, Texas**

## **Event Hours**

### **Friday**

*Registration Begins 8:00 AM  
Expo Open 8:30 AM to 4:00 PM  
Trade Show 11:00 AM to 4:00 PM  
Closing Speaker 4:00 PM  
Social Hour 5:00 PM  
Lunch \$20 Per Person,  
Advanced Registration Required  
No Keynote With Lunch*

### **Saturday**

*Registration Begins 8:00 AM  
Expo Open 8:30 AM to 1:00 PM  
Trade Show 8:30 AM to 1:00 PM  
Advanced Registration Free  
\$5 Day of Show*

*Register on-line at  
[www.dfwcai.org](http://www.dfwcai.org)  
[linda@dfwcai.org](mailto:linda@dfwcai.org)  
or call  
(817) 633-7688*

**MAINSTAGE**  
**LIVE**  
**DEMONSTRATIONS**  
**(30 Minutes Each)**

**Home Depot**  
Water Conservation Techniques  
Fun with Faux Finishes

**Greater Texas**  
**Landscapes**  
Reinventing the Community  
Landscape for Aesthetics

**The Brickman Group**  
Beyond Roses: Using Flowering  
Native Plants in Your Community

**Pet Waste**  
**Professionals**  
Effective and Environmentally  
Safe Waste Procedures

**Home Team Pest**  
**Defense**  
Effective Mosquito Control

**Lake Management**  
**Services**  
Getting the Most for Your Lake  
Management Dollar

**Southern Botanical**  
Pool Maintenance

**8:30 - 9:30 AM**

**Is That Crack Normal?**

Learn how you can safely determine what is a normal maintenance item vs a potentially costly construction defect and the simple steps you can take to protect your Association.

Become a construction expert in 90 minutes! In this class you will learn the steps of how to understand the issues your HOA is experiencing and the necessary solutions to restore your community. You will hear from legal, construction and engineering experts as they walk you through the sometimes daunting process of determining the unexpected damage to your Association's buildings.

*Scott F. Sullivan, Esq. And Jennifer A. Seidman with the construction defect law firm of Sullan, Sandgrund, Perczak & Nuss, PC. The Sullen firm represents homeowner associations and in construction defect claims and cases. They have experience handling cases with many types of construction defects including foundation movement and damage, soil and slope instability, design defects, water intrusion, poor workmanship and building material failures.*

*Jeremiah Franks is the Vice President of Southwest operations for Reconstruction Experts and has over 15 years of experience in HOA reconstruction. Jeremiah has lead operations for RE since early 2001, opening several branches throughout the United States. He has personally run over \$25 million in large post litigation HOA reconstruction projects and has served as a cost expert witness for 5 years.*

**Human Resource Issues for Associations**

The world of human resource management today requires a solid understanding of the dynamic of the laws at play in the hiring, coaching, mentoring, disciplinary and discharge process. In an ever changing workplace with, in some cases, the four generations working side by side, there is needed knowledge and insight required to make the workplace a bit less stressful and properly attend to those daily HR needs. Join ADP, the premier provider of HR services to companies nationwide as this topic is explored and needed information to help you drive your performance is shared!

**IT Issues with Community Associations Today**

Discover how ever changing technologies and new gizmos and gadgets are transforming the manner in which managers and boards deliver service to their communities. Representatives of "Strongroom", [www.strongroom.com](http://www.strongroom.com), financial data solutions in a fascinating session focusing on what these emerging technologies can do for you today.....and tomorrow!

**Planning Successful Community Social Events**

Staycations, at home events, communities striving to bring cohesive enjoyment to its members all add up to the skills needed to create great, enjoyable, and fun community social events. But – these events do not just happen. They take time, planning, skill, budgeting and community involvement to be a success. Todd Davidson, CMCA®, AMS™, PCAM® and his social crew knows the many avenues needed to drive to create success in developing solid social events. Come listen and learn from the best who can help you achieve your community's social goals and hear stories that always make this type of session a real Expo pleaser.

**9:30 - 10:30 AM**

**Watch out for those Contracts and their Pitfalls**

This session, led by Marc Markel, Esq. Will take you on a journey that explores the many facets of contract negotiation and contract language that managers, boards and others need to be keenly aware of to avoid placing themselves or their associations in any legal jeopardy. Delivered in the manner only Marc Markel can do, this session is certain to illicit some laughs, some "ah-ha" moments and provide valuable information that is "take back to work ready."

**The Real Issues with Workplace Violence**

Linda Beverly knows all too well the dangers of workplace violence. Sometimes undetected, this violence can take on many forms – verbal, physical, mental as well as suggestive. We all need to learn to recognize these forms of violence and gain the tools needed to

deal with them should they ever cross our path. Come and be informed, enlightened and hear an eye-opening session on a topic that we seldom address but is prevalent in more ways than we can imagine!

### **How to Say No: Managing Expectations and Performance vs Perception**

Whether a Board member or manager, one of the greatest challenges we face is managing expectations on a day to day basis. With the bombardment of requests from staff, clients and others, balancing home and work life, evaluating true performance vs perception of owners in how we deliver service, sometimes saying no, in the appropriate manner, is the best course to follow. This manager-driven panel discussion led by Pat Clark, PCAM®, of Excel Association Management, an industry expert and well known DFW colleague, will create some insightful dialogue and give you insights to help you in dealing with those expectations.

### **Loans, Loans, Loans!**

Every HOA from time to time needs the services of securing loans for improvement, enhancement or replacement. In the ever changing regulatory environment and volatile world of banking today, there are tips and tricks to help the savvy association manager and board navigate the waters in obtaining the financing they need.

Come join Ruth McLaughlin of Mutual of Omaha Bank and a panel of industry colleagues to learn best practices for navigating the lending requirements for HOA loans. This presentation will provide a roadmap to guide you through the pit stops you'll need to make along the way to ensure you'll cross the finish line and help you procure the needed funds to attend to all those association repairs or replacements. This is a can't miss session.

**10:30 - 11:30 AM**

### **Cyber Theft & Fraud: Are You Prepared?**

This encore session, chaired by Mutual of Omaha Bank, delves right back

into an issue many of our members were unable to attend and is perfect for boards, self managed communities and managers and CFO's in general. Imagine coming in to work one day and finding your accounts completely wiped out by insidious forces operating under the radar just to get their hands on the Association's hard-collected monies. Learn about these groups, their methodologies and the steps you can take to protect and defend your software, its users and the funds critical to Association operations today!

### **The Changing North Texas Green Industry: Adapting Your Landscape to Current and Future Changes**

With the many restrictions faced by North Texas HOAs and communities alike, this interactive session is sure to be a winner with Expo attendees wishing to learn more about landscape adaptation and what is on the horizon regarding irrigation limitations and working with them. Come join a panel hosted by Lewis Parker of Haynes Landscape that includes some of the best, well known names in our industry today discussing the multi-layered topics surrounding these changes including:

- Landscape Water Conservation: Jim Reaves, Texas Nursery & Landscape Association, Texas Watersmart Coalition
- Native and Adaptive Plantings: Robert Weir, Shades of Green , outstanding knowledge in native and adaptive plantings
- Texas Turfgrass Management: Dr. Jim McAfee, Texas Agrilife Research and Extension Center
- Alternative Water Sources: Dotty Woodsen , well known speaker from the Texas Agrilife Research and Extension Center and expert in rainwater harvesting and usage

## **CLOSING KEYNOTE**

### **Ron White Unlocking Minds to Maximize Potential Driving Leadership by Becoming a Brain Athlete**

Considered the world's foremost memory expert and mental athlete, Ron White has spoken all over the world on the business building leadership power of a trained memory. He is a two-time national memory champion having won the USA Memory Championship in 2009 and 2010. During the past 18 years , he has also conducted memory training for General Motors, Microsoft, Toyota, Honda, American Airlines, Cisco Systems, Boy Scouts of America and many other leading companies.

Ron is the author of two books and more than a dozen audio programs. He has been a featured guest on over 200 radio programs and numerous television appearances. In the Fall 2010, Ron appeared on The History Channel as a featured subject-the memory guy-in Stan Lee's Super Humans.

A proud member of the US Navy, Ron served as an active reservist and returned in December of 2007 from a tour in Afghanistan. In every talk Ron gives, he shares that he is no different from anyone and that everyone can learn how to improve their memory which can certainly help in driving leadership.

This is a "can't miss" keynote and the DFW Chapter of CAI is pleased and honored to have him with us for our Premier event of the year!!!

Be sure to join us for a stimulating, informative and success driven session!!!

# **CEO FORUM FRIDAY JULY 27, 2012**

## **Community Leader Roundtable**

An important Roundtable discussion between CEOs and Mayors/City Managers about the role community associations play - not just for the residents within their communities, but as a part of the larger community. Join elected officials from Frisco, Plano, Irving, Rowlett, and more!

## **Hiring and Firing Do's and Don't's/Employee Manual Pitfalls**

**Laura Alaniz, Roberts Markel Weinberg, PC**

People are your most important asset, and represent a sizable investment for your company. When it comes to the vetting process, there are things you can ask and cannot ask to get to the heart of a matter. If that investment isn't working out, things you do when parting ways can come back to haunt you. Make sure that your company is minimizing risk, both in the hiring and firing process.

## **Achieving Excellence In Customer Service**

**Marshall Johnson, PCAM, President of CWD Group**

CAI National instructor Marshall Johnson, PCAM, has been involved in the condominium industry since 1985 and now specializes in the consulting, construction, and management of high-rise, mixed-use, and master association common ownership projects. His unique approach to the industry has resulted in long-term client and employee retention. Marshall will show you how to make the most out of the customer service experience to maximize client retention for years to come.

## **The Legal Foundation of Community Associations**

**Judd Austin, Henry Oddo Austin & Fletcher**

This comprehensive overview shows you the legal foundations of community associations, where community associations derive their authority, the hierarchy of your governing documents, the tools a community has to enforce compliance, and goes over some of the "must do's" that every association is required to follow.

## **Understanding HOA Financials**

**David DeVolt, CPA, DeVolt & Company, PC**

Does your HOA have to file tax forms? Are you staying on budget? Are you setting aside funds for a rainy day or struggling to get by month to month? How can you protect your association's funds from fraud and abuse? This presentation will give you an easy-to-understand overview of different methods for keeping track of your association's funds, and some best practices to avoid financial pitfalls.

## **Is That Crack Normal?**

Learn how you can safely determine what is a normal maintenance items vs a potentially costly construction defect and simple steps you can take to protect your Association. Become a construction expert in 90 minutes! In this class you will learn the steps of how to understand the issues your HOA is experiencing and the necessary solutions to restore your community. You will hear from legal, construction and engineering experts as they walk you through the sometimes daunting process of determining the unexpected damage to your Association's buildings.

## **Good Governance: How To Properly Conduct A Meeting**

**Robert Blend, The Blend Law Firm**

Constantly late or absent Board Members? Unreasonable Committee Chairs? Dealing with volunteers can sometimes be difficult. Learn what not to do when conducting in meeting in this fun, interactive session that demonstrates how proper conduct during Board and Committee meetings helps things go smoothly, fosters good governance, and promotes community harmony.

## **Cyber Theft and Community Associations**

**Ruth McLaughlin, Mutual of Omaha Bank**

Cyber Theft is the greatest threat facing the community association industry today. Come hear the nation's leading expert on the cyber threat to our industry teach how professional cyber thieves will walk right past your firewall and virus protection to steal reserve funds, wipe out payroll and attorney trust accounts. Learn what key question you need to ask your insurance broker about cyber theft and the special insurance you should acquire. See what steps you can take to reduce the chance you will be attacked by cyber criminal cartels. Learn how "you" could be the #1 suspect when the money comes up missing!

## **Community Maintenance**

**Andrea Meyer-Smith, Select Management Company, AAMC**

Whether you're dealing with your pool, perimeter fence, elevator, or something more complex, community maintenance is a key element to your responsibilities as a Board or Committee member. Learn how to determine what you are responsible for maintaining, what the residents are responsible for, and how to properly fund these items to ensure the appeal, safety, and functionality of your community's assets.

## **Legislative Session Overview**

**Dean Riddle of Riddle and Williams, PC**

**Texas Community Association Advocates**

During the last legislative session, a number of new laws went into effect that change the way community associations conduct business. If you are still doing things the "same old way," you may not be compliant! Learn what new laws passed, how your community should implement them, and what you need to do to protect your association.

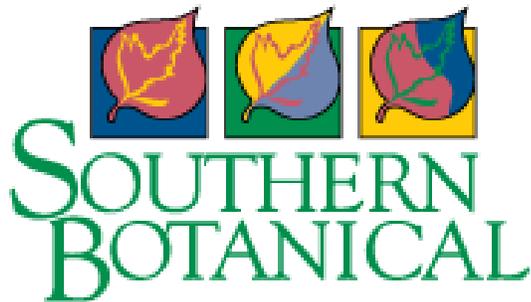
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