

CAI Nevada Chapter Policies

Effective 2021



NEVADA CHAPTER

community
ASSOCIATIONS INSTITUTE





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CODE OF CONDUCT POLICY

Purpose: To encourage and maintain the highest professional standards, the Board has established the following rules pertaining to the conduct of members and their guests while participating in Chapter sponsored events or representing the Chapter at the events of others. A member shall be personally responsible for the failure of themselves or their guests to comply with these rules. Any individual witnessing a violation of the code of conduct is encouraged to report the incident immediately to the Chapter employee, board or committee member in charge of the event and then to follow up with a written complaint to the Chapter board of directors.

- A. Individuals shall conduct themselves so as not to jeopardize or interfere with the rights and privileges of others and shall not compromise the safety of others by their actions.
- B. Individuals shall obey all safety rules and shall discontinue all unsafe activity immediately upon direction from Chapter staff, board members or committee members.
- C. Individuals shall refrain from loud, profane, indecent or abusive language or acts when addressing other persons, including Chapter staff.
- D. Individuals shall not physically abuse, harass, accost or reprimand any member, guest, staff member, or director.
- E. Individuals shall not conduct themselves in a manner that interferes with the management of the Chapter.
- F. Individuals shall not reprimand or attempt to discipline any Chapter employee. Any inattention to duty or lack of courtesy on the part of any Chapter employee should be reported to the Chapter Board of Directors.
- G. Members shall be held personally responsible for any damage to Chapter property inflicted by themselves or any individual included within the categories of persons enumerated in the Introduction herein above.
- H. Members shall not profit financially from their membership in a way distinct from opportunities made available to other members.
- I. Most Chapter events are sponsored events. Suitcasing is not permitted. Individuals engaged in any form of marketing activity, other than the program sponsor, will be asked to leave the event and no refund offered. Repeated violations of the suitcasing policy may result in other sanctions.
- J. Proper dress is required when attending Chapter events or representing the Chapter.
- K. No Member shall make any remarks regarding any other member or place anything in writing about any other member that could be deemed libelous, slanderous or an act of defamation.
- L. ALCOHOL AT CHAPTER EVENTS: Alcoholic beverages shall be provided, sold and served by a licensed caterer who holds a valid liquor license or an individual who holds a valid liquor license.

At no time will participants be allowed to bring their own alcoholic beverages (BYOB) with the exception of certain events, where permitted, a sponsor may provide their own alcohol such as a golf tournament.

A designated driver service shall be provided and the cost of such service shall be incorporated into the event budget.

Each CAI sponsored event shall incorporate a strategy for alcohol service and consumption consistent with the guidelines above, such as limiting an open bar service time.

Signed: _____ Date: _____

Print Name: _____



CONFIDENTIALITY AGREEMENT

In connection with any information shared between a designated Committee Member and the Nevada Chapter of Community Associations Institute (NV-CAI), the Committee Member understands and agrees the information is confidential and proprietary.

Accordingly, the Committee Member agrees as follows:

The Committee Member Shall:

1. Understand all information created and/or developed during CAI, or its Chapters', committee and/or general meetings, is the sole property of CAI, and its Chapters.
2. Strive to maintain in secrecy and keep confidential all information created and/or developed by CAI, or its Chapters, using the same degree of care used to keep his or her own information confidential;
3. Refrain from providing other trade groups (Ex. NACM and CAMEO) with the ideas and information generated in CAI committee meetings;
4. Limit sharing or distributing of confidential information created and/or developed by CAI, or its Chapters, only to those under the Committee Member's control or supervision within CAI, or its Chapters, who reasonably require knowing such confidential information;
5. Use all information created and/or developed by CAI, or its Chapters, to benefit only CAI, or its Chapters.

Committee Member

(Print)

(Sign)

COMMITTEE MEMBER ATTENDANCE / RESIGNATION POLICY

Attendance

- It is the responsibility of the Committee Chair(s) to maintain an attendance record of all committee members and submit to the Chapter Executive Director upon request.
- If a committee member is unable to attend a meeting, it will be their responsibility to notify the Committee Chair(s), in a reasonable amount of time, of their absence.
- Failure of a committee member to notify the Committee Chair(s) will be deemed an unexcused absence.
- Any committee member who has three (3) unexcused absences within a calendar year will be removed from the Committee Email Distribution List and considered off the committee.
- Reinstatement of a committee member removed for unexcused absences will be subject to Chapter Board of Directors approval.

Resignation

- Any committee member who finds it necessary to resign, for whatever reason, from his/her committee, must notify the Committee Chair(s) at the prior meeting or via email to the Committee Chair(s) and the Chapter Executive Director.

PRIVATE PARTY POLICY

- All hospitality suites and hosted events (golf, spa, after parties, etc.) must be approved by CAI Nevada. Hospitality suites/hosted events are not permitted during official chapter events & activities. Non-participating companies/groups/individuals are not permitted to host events for event attendees.

INVOICE POLICY

- All invoices issued by the chapter or Hilburn & Lein, CPAs on behalf of the chapter are subject to the following payment policy:
 - All Invoices are due Net 30.
 - Any Invoice over 30 days is subject to a 10% late fee.
 - Any Invoice over 60 days will result in the suspension of sponsor benefits such as luncheon table or tickets, advertising and event participation.
 - All outstanding invoices must be paid in full prior to any event registration and/or no later than 30 days prior to the event date.

REFUND POLICY

- CAI Nevada Chapter requires all reservations to be made through the Cvent reservation system. A written email confirmation from the Cvent website will follow immediately. Certain events may be processed outside of Cvent and will be noted.
- Cancellations must be made through Cvent no later than 24 hours in advance for a full refund. Certain events may require more than 24-hour cancellation notice and will be noticed on the specific event registration.
- No Shows will be charged for the seminar fee. Payment must be received prior to attending a future seminar.
- Member walk-ins are subject to pay the non-member fee and non-member walk-ins will be subject to a \$10 surcharge.

REQUEST FOR EXTRA CAI NEVADA COMMUNITY INTERESTS PROCEDURE

As a contributing author, you are welcome to order up to 10 extra copies of the issue in which your article appears. Please submit this form no later than the 10th of the month prior to your month of print. For example, if your article appears in the November issue, please send your request no later than October 10th.

If your request is larger than 10 issues, please make arrangements with the CAI staff to order directly from the printer which will include printing costs and direct shipping. You are responsible for picking up your issues in a timely manner. Thank you!

Name: _____

Date: _____

Issue requested: _____

Quantity (up to 10): _____

Email: _____

Phone: _____



CAI NEVADA EDUCATION COMMITTEE SPEAKER PROTOCOL

The Community Association Institute (CAI) is a national organization dedicated to fostering vibrant, competent, and harmonious communities through its 64 chapters worldwide, including Canada, the Middle East and South Africa, and relationships with housing leaders in a number of other countries, including Australia and the United Kingdom.

Fundamental to that primary mission is providing the education, training and certification for professional managers, volunteer board members, community leaders and homeowners that is essential to good management and governance.

The CAI Nevada Chapter sponsors more than 40 educational programs each year. Included among those programs are Continuing Education Seminars which provide certification for professional managers; Dedicated Community Association Leaders (DCAL) Seminars and Advanced DCAL, which provide Recognition for Volunteer Leaders; and a wide range of topical programs for managers, homeowners and the general public on issues which confront homeowner and condominium associations throughout the state.

The CAI Nevada Chapter Board of Directors is committed to providing programs of exceptional quality which meet the educational and training needs of both the professionals who manage community associations and the volunteers who govern them.

The Board assigns the Education Committee with primary responsibility for selecting programs, reviewing curriculum, recruiting volunteer speakers, and scheduling and implementing each event.

The CAI Nevada Chapter President, Executive Director and the CAI Education Committee are responsible for reviewing the credentials and program proposals of prospective speakers. When a program proposal is viewed to fit with the chapter educational objectives and the individual meets the professional qualifications, the Executive Director may schedule a time for an interview and program presentation.

The following “Selection Protocol for Volunteer Speakers” is intended to provide guidance to CAI Members interested in volunteering to join the CAI Nevada Chapter Speakers Bureau and others who are interested in recommending speakers to the Education Committee.

Community Associations Institute Nevada Chapter “Selection Protocol for Volunteer Speakers”

The CAI Nevada Chapter is a not for profit organization that relies on CAI volunteers to present educational training to our members. As our membership grows, it is imperative that we assist volunteer teachers and speakers in developing their content and presentation skills to meet the highest standards of educational programming.

In recognition of the continuing growth of our CAI Nevada Chapter, we are encouraging those interested in volunteering for teaching responsibilities to consider “team instructing” strategy for presenting their curriculum plans.

Those individuals who are interested and willing to instruct seminars sponsored by the CAI Nevada Chapter must comply with the following procedures and be willing to sign the “CAI Nevada Chapter Speaker Agreement.”

The “Selection Protocol for Volunteer Speakers” was developed by the CAI Nevada Chapter Board of Directors and the Education Committee.

Speaker Requirements: Professional Continuing Education Credit Programs

Individuals interested in presenting Professional Continuing Education Seminars must be approved by the Nevada Real Estate Division (NRED). NRED approval is the minimum requirement for consideration by the Education Committee.

Prospective speakers for professional continuing education seminars must prepare a presentation packet which includes the following:

- I. Documents of professional credentials, education and experience. Note: Community Managers should have at minimum, 5 years in the community association industry and hold an AMS designation through CAI.
- II. Verification of the CICCH's Certificate of Approval for speakers and back-up speakers presenting the seminar. Note: Speakers may be requested for an interview by the Education Committee.
- III. Resumes and Credentials of Instructors and Guest Instructors should be included in the submission.
- IV. Present proposed Seminar Curriculum, Outline & State Approval Certificate.

V. Provide Participant Notes and Handout Materials.

VI. Provide a copy of Visual Aids including Power Point presentations.

The Presentation Packets will go before the Education Committee and will go through the CAI Nevada approval process. All of the above items will be confirmed to be in good standing and a trial run of the proposed presentation may be requested.

CAMICB (Community Association Managers International Certification Board)

CAMICB is the professional accreditation body for over 20,000 community association managers worldwide. CMCA's manage condominium & homeowner associations, housing cooperatives, resort communities and commercial tenant associations.

Coursework which meets the standard criteria may be submitted for review and approval to CAMICB. If proposed coursework is judged to meet the criteria set forth, it will be approved for a two-year cycle. Within 45 days of the program offering, providers must submit an Attendance Roster. Providers are responsible for issuing Certificates of Attendance to students upon successful completion of the program. Coursework which has been previously approved by CAMICB, may be re-submitted for staff approval in consecutive years, if the coursework has not been altered between years.

Please provide the NRED State Approval and speaker resume documents to CAI Nevada for application to CAMICB.

Speaker Requirements: Other Program Speakers including Luncheons, Homeowner Education & Roundtables

Individuals interested in presenting professional education programs at Luncheons, Homeowner Seminars or Roundtable events must be approved by the affiliated committee and the Education Committee. Those wishing to speak must prepare a Presentation Packet which includes the following:

- I. Documents of professional credentials, education and experience. Note: Community Managers should have at minimum, 5 years in the community association industry and hold a n AMS designation through CAI. Homeowners should be at minimum a board member for 3 years and have a DCAL or Advanced DCAL recognition by CAI Nevada.
- II. Verification of the CICCH's Certificate of Approval for speakers and back-up speakers presenting the seminar. Note: All speakers may be requested for an interview by the Education Committee.
- III. Resumes and Credential's Instructors and Guest Instructors should be included in the submission.
- IV. Present proposed program curriculum and outline.
- V. Provide Participant Notes and Handout Materials.
- VI. Provide a copy of Visual Aids including Power Point presentations.

The Presentation Packets will go before the Education Committee and will go through the CAI approval process. All of the above items will be confirmed to be in good standing and a trial run of the proposed presentation may be requested. All speakers may be requested for an interview by the Speaker Committee Review Team.

Speaker Agreement

Speakers who are selected to present at any CAI Nevada Chapter event agree to:

- Recognize that event dates are published months in advance and there is no opportunity to change dates or times to accommodate the speaker. **If a speaker asks for a scheduled seminar to be changed, there will be no obligation or guarantee that the seminar will be rescheduled for later in the year.**
- If the speaker is presenting his/her own seminar for CAI's benefit, **speakers agree not to teach the same class 30 days before and 30 days after the CAI taught class.**
- Speakers may not purport to be speaking on behalf of Nevada Chapter of CAI without the prior written approval of the Board of Directors. Further, speakers may not distribute any document which purports to be an official document of Nevada Chapter of CAI.
- Speakers may not use the Nevada Chapter CAI letterhead or logo without written approval of the Executive Director.
- Any correspondence or memoranda to the general membership, media or public concerning the Nevada Chapter of CAI business must be prepared on Chapter Letterhead and approved by the Executive Director.

- Speakers must understand that CAI Educational Events are non-commercial. **Speakers are speaking as a community service for CAI and are to offer educational information only.**
- Business cards may not be distributed to participants unless requested by a specific individual. The speaker, unless he/she is also the sponsor, may not display or handout promotional material. The Chapter provides a table at the program where promotional information and business cards may be displayed by the event sponsor.
- Speaker and/or sponsor cannot use or compile their own attendee list for non-CAI post- marketing purposes.
- Final participant Notes and Handouts must comply with the non-commercial intent of the Educational Programs. Handout material may contain the following speaker **information on only the front page of the handout and Power Point presentation.**

Name

Corporate Affiliation Address Phone/E-mail Contact

Co-Instructors

The Education Committee encourages co-instructing as a way of increasing the number of qualified presenters and improving the quality of CAI programs thru collaboration among our experienced speakers. When speakers plan to co-instruct a program, all members of the team are expected to submit their credentials with the original submission. Interviews may be held by the Education Committee.

Guest Speakers

All Speakers must be approved by the Education Committee. Per direction of NRED for any continuing education seminar, **Guest Speakers** must **adhere** to the **approved** outline. **Guest Speakers** shall not conduct any self-promotions.

Violations

To ensure all CAI programs are of quality and value, violations of any of the above shall be enforced by the Education Committee and/or the CAI- Nevada Board of Directors. Violations of the foregoing standards may be referred to the Chapter Officers for their consideration of reprimand. Such reprimand may include, but not be limited to, removal from the approved list of courses and/or instructors.

I accept the responsibility of presenting

_____ Title of Seminar

_____ Nevada State Certificate & Resumes are attached

_____ Date

_____ Location

I have read the Speaker Agreement and will adhere to the spirit and intent of the guidelines.

Speaker (1) Signature: _____ Date: _____

Speaker (2) Signature _____ Date: _____

CAI NEVADA SUITCASING POLICY

The Nevada Chapter of the Community Associations Institute (CAI) has a strict no-tolerance policy regarding “SUITCASING.”

Definition: SUITCASING is any act conducted by an entity, business or person whose purpose is to solicit business, sell products and/or services to event attendees or conduct any other commercial activity prior to, during and/or after a CAI sponsored event, in any “Prohibited Area” without specifically supporting that particular event by being a business sponsor or by having a booth. “Prohibited Areas” are any hotel guest room or hospitality suite, a restaurant, club, or any other public place of assembly including but not limited to the aisles of the exhibition, seminar or event, another company’s booth, a hotel lobby, classroom or meeting room.

A persons who attends or otherwise participates in an event not specifically sponsored by his or her company is considered SUITCASING if he or she is dressed in a manner that his or her company logo, colors, uniform or other garb, as determined by CAI, are visible to guests and attendees. The specific prohibition in this paragraph does not apply to the CAI Nevada Monthly Luncheon/Program, Golf Tournaments, Bowling and CAI Sponsored Social Mixers.

Please note that while all members are invited to attend a CAI sponsored event, any attendee who is observed to be SUITCASING or in violation of any portion of the Exhibition Policy, will be asked to leave immediately.

Non-sponsoring business partners participating in a seminar as attendees or speakers are prohibited from soliciting business in or after sessions, or in the proximity of the events venue. Violators of these policies will be ejected from the seminar and charged the tabletop sponsorship rate (\$500-\$2,000), which must be paid prior to registering as an attendee, exhibitor or sponsor at any future CAI conference, event or seminar.

CAI must be informed of any hospitality suites or other gathering locations being used in connection with a CAI sponsored event, and express written consent from CAI must be received prior to the event. Please report any violations you may observe to CAI.



CAI NEVADA RAFFLE POLICY

CAI Nevada has adopted the following policy as it relates to raffle/prize drawings for CAI Nevada Organized Events. The purpose of the policy is to maintain fairness, remove any perception of impropriety and to assist service providers and/or merchants to be compliant with NRS 116.31185.

Any service provider or merchant who offers a drawing at his or her display whereby attendees may participate by completing a form or leaving a business card must adhere to the following rules:

- I. All attendees of the event must be eligible to participate in the drawing. The only permissible restrictions are that the service provider or merchant may restrict the participants to active members of CAI or may require the winner to be present at the drawing. Any restrictions as to who may or may not participate must be clearly specified at the location of the display and in plain sight.
- II. All entries shall be collected and placed in a specified drawing container. Once an entry has been submitted, the service provider or merchant may not remove that entry without the permission of the entrant.
- III. The drawing shall be open for submitting entries for substantially the entire event, subject to exceptions permitted by the Executive Director where extenuating circumstances exist. Entries in the drawing are limited to one (1) per person. If a contestant submits multiple entries for the same contest/drawing, he or she will be disqualified from winning. If the service provider or merchant is complicit in the submission of multiple entries, the entire drawing will be disqualified, and the service provider or merchant will be subject to additional sanctions as determined by the Board.
- IV. All Prizes must be turned over to CAI Nevada prior to selection of the winning entry and shall be awarded as follows:
 - a. The Executive Director or assignee shall mix the entries in the container. When the entries have been mixed, the individual designated by CAI Nevada will draw out the first entry and hand it to the Executive Director who will qualify and confirm the winning entry.
 - b. If the first entry drawn is deemed ineligible or unqualified or is not present if being present to win is required then another entry shall be drawn until a qualified entry has been selected. At that time the designated representative will announce the winner.
- V. Prizes are not transferable. There are no substitutions permitted. There are no warranties extended, express or implied. The winner is responsible for all taxes and fees associated with receipt or use of the prize.

Release/Limitation of Liability

By participating in the drawing, each participant agrees to release and not hold CAI Nevada and the employees, officers, directors, shareholders, agents, representatives of Sponsor, its parent companies, affiliates, subsidiaries, advertising, promotion, and fulfillment agencies, and legal advisors, harmless from any and all losses, damages, rights, claims and actions of any kind in connection with the Sweepstakes or resulting from acceptance, possession, or use of any prize, including without limitation, personal injury, death, and property damage, and claims based on publicity rights, defamation, or invasion of privacy.





THANK YOU



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