Curriculum Vitae

THOMAS L. WILLIS, AMS®, PCAM®

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PROFESSIONAL DESIGNATIONS

AMS® - Association Management Specialist – awarded February 2002
PCAM® - Professional Community Association Manager - awarded October 2002

HIGHLIGHTS OF PROFESSIONAL EXPERIENCE

Principal, Association Bridge, LLC 2006-Present

- Strategic planning for community associations and management companies
- Retainers for ongoing operational and strategic support for community associations and management companies
- Developer transition/new owner orientation programs
- Operational analysis and systems set-up
- Customized orientation programs to assist community associations prepare for and successfully complete the developer transition process
- In-house seminars for management companies and on-site staff
- Manager search and placement
- Facilitation of management service RFPs
- Customized leadership training
- Development of organizational culture
- Budget development integrated with the identification and implementation of vision and mission
- Project planning, including visioning, resource identification, creation of multi-year cash flow models, assistance with community messaging and facilitation, and facilitation of loan RFP process
- Time management and emotional intelligence training
- One-on-one mentoring
- Property inspection reports
- Business re-engineering

Vice President, Zalco Realty, Inc. 2002-2018
Senior Community Manager, Zalco Realty, Inc. 2000-2002

- Integral to coordination of merging Dubin & Associates and Zalco Realty personnel, systems and operations after corporate acquisition
- New client start-up services, served as either team leader or interim community manager
- Mentored community managers after hiring
- Mentored and trained on-site managers
- Budget development, consultation & facilitation of management services for developing communities
- Developed and presented customized orientation and training seminars for developing and established community association members and leaders
- Assisted clients with special needs and projects in support of community managers
- Developed and facilitated strategic planning sessions for association leaders
- Assisted the President in the supervision of the Residential Division
- Executive Committee Member 2000-2016

Director of Community Management, Dubin & Associates, Inc. 1999-2000
- Responsible for oversight and supervision of all community managers and administrative assistants
- Trained and mentored portfolio and on-site managers
- Facilitated management services for developing communities
- Developed and presented customized orientation and training seminars for developing community association members and leaders

Site Operations Specialist, Dubin & Associates, Inc. 1991-1999
- Created, established and supported new on site management offices
- Mentored on-site managers and other personnel
- Facilitated planning and performance of capital and administrative projects
- Performed operational analysis and re-engineering of onsite operations, both maintenance and administrative
- Served as part-time on-site manager for various Dubin & Associates managed clients in conjunction with role as Site Operations Specialist

Owner/Operator, Total Contracting Systems, 1983-1991
- Owned and operated small service company (staff of 25 at peak) initially formed to provide decorating and building maintenance services to commercial and residential clients
- Pioneered contracted integrated maintenance management services for condominium associations in 1985
- Pioneered contracted on-site management services with the option of integrating maintenance services into service packages in 1987

SEMINARS & PRESENTATIONS

Community Associations Institute

"O Say Can You See?"
- Central Virginia Chapter Knowledge Development Day 2026

"40 Years of Silly Human Tricks – And What I Learned From Them"
- Central Virginia Chapter Knowledge Development Day 2025

"Mindset 2025 – A Checkup From the Neck Up"
- Keynote – Washington Metro Chapter Jump Start January 2025

Strategic Planning Workshop
- Central Virginia Chapter 2024 & 2026 (co-presenter)

"Buried Treasure – Little Gems, Big Differences!"
- Central Virginia Chapter Knowledge Development Day 2024

"Creating Space – The Fine Art of Leadership, Management & Life"
- Virginia Leadership Retreat 2022
- Keystone Chapter Executive Leadership Retreat 2024

SEMINARS & PRESENTATIONS (CONTINUED)

"Thomas Jefferson's 10 Rules for Community Association Leaders & Managers"
- Chesapeake Region Chapter 2022

"Level Up and Change the Game"
- Keynote – Keystone Chapter Fall Managers Symposium 2021

"Beyond Credential: EQ – The Key to Personal and Professional Success"
- National Annual Conference, Washington, DC, 2018 (co-presenter)
- Virginia Leadership Retreat 2019 (co-presenter)
- Washington Metro Chapter 2020 (co-presenter)
- Central Virginia Chapter 2021
- Chesapeake Region Chapter 2021

"We Are All Insane…or Geniuses…Your Call"
- Southeast Virginia Chapter 2018

"Busted Stuff"
- National Annual Conference, Las Vegas, NV, 2017

"Come As You Are, Leave Different – Stress & Time Management Best Practices"
- Southeast Virginia Chapter 2017 (co-presenter)

"Between the Ears, Between the Line: Reading the Minds of Board Members to Be a More Effective Community Association Lawyer"
- Annual Law Seminar (co-presenter)

"Raising the Bar as Professionals and People"
- Virginia Leadership Retreat 2016

"Jane – Stop This Crazy Thing!!: Time Management in the 21st Century"
- Washington Metro Chapter 2016

Facilitated mock board meetings of the fictitious "Gates of Hell Condominium"
- Southeast Virginia Chapter 2014
- Southwest Virginia Chapter 2015

"Managing Your Liability – Knowing When to Call in the Professionals"
- Chesapeake Region Chapter 2015 (co-presenter)

"Getting Stuff Done"
- Washington Metro Chapter 2015

"Ethical Boards and How They Find & Work Effectively with Likeminded Professionals and Service Providers"
- Washington Metro Chapter 2015 (co-presenter).

SEMINARS & PRESENTATIONS (CONTINUED)

"Finding the Most Efficient Route – Aging Infrastructures: A Case Study"
- Virginia Leadership Retreat 2014 (co-presenter)

"Lead First!"
- Southwest Virginia Chapter CAI 2014

"The Art & Science of Conflict Resolution"
- National Annual Conference, San Diego, CA 2013 (co-presenter)
- Keynote - Hudson Valley Chapter Annual Meeting 2013 (co-presenter)
- Georgia Chapter 2020

"Going from Survive to Thrive – Excellence in Community Association Leadership"
- Washington Metro Chapter 2013

"Time Management, Multi-Tasking & Other Myths"
- Washington Metro Chapter 2013 & 2014
- Pennsylvania/Delaware Valley Chapter 2014
- Northern Ohio Chapter 2015
- Webinar for CAI National 2015
- Georgia Chapter 2020

"Taking Care of Business"
- Virginia Leadership Retreat 2012 (co-presenter)

"Managing in the Workplace"
- Washington Metro Chapter 2012 (co-presenter)

"Aging in Place"
- Virginia Leadership Retreat 2011 (co-presenter)

"Best Practices for Managing Short-term and Long-term Budgets"
- Montgomery County CCOC Annual Forum 2011 (co-presenter)

"Manager in the Middle"
- Virginia Leadership Retreat 2010

"Legal Aspects of Communication"
- Washington Metro Chapter 2010 (co-presenter)

"Best Practices"
- Washington Metro Chapter 2009

"Talk to Me: The Art of Board Member Communications"
- Reston Association 2009 (co-presenter)

SEMINARS & PRESENTATIONS (CONTINUED)

"That Which Does Not Kill Us – War Stories and What We Learned from Them"
- Washington Metro Chapter 2008 (co-presenter)

"Where Do I Find Staff?"
- Washington Metro Chapter 2007 (co-presenter)

"Accepting the Challenges to Lead - Perspectives for the Professional Community Manager"
- Regional Conference, Orlando, FL 2006 (co-presenter)

"Accepting the Challenges to Lead & Strategies to be an Effective Leader"
- Washington Metro Chapter – 2006 (co-presenter)

Other Organizations

"Finding Yes in a World of No"
- California Association of Community Managers High Rise Summit 2019

"Advanced Homeowner Education: Financials"
- Reston Association 2013

"Lead First!"
- Reston Association 2012

"HOA Leadership Workshop"
- Prince William County, VA Neighborhood Conference 2012

"Building the Association's Budget"
- Montgomery County Commission on Common Ownership Communities Annual Forum 2011 (co-presenter)

"All About the Board"
- District of Columbia Cooperative Housing Coalition 2010 (co-presenter)

"Talk to Me: The Art of Board Member Communications"
- Reston Association 2009 (co-presenter)

"Accepting the Challenges to Lead & Strategies to be an Effective Leader" –
- Potomac Association of Housing Cooperatives 29th Annual Conference, Dover DE 2005

PUBLISHED ARTICLES

*"*Time-Tested Principles From a Long, Strange Budgeting Trip" *Consensus* Fall 2026 - Awarded Central Virginia Chapter's People's Choice Award for Best Article of the Year

PUBLISHED ARTICLES (CONTINUED)

"Tools to Build, or Rebuild, Your Community" *Community Assets* July-August 2026

"New Year's Resolutions – Bah Humbug!: Replacing Resolutions With Goal-Setting" *Community Assets* January-February 2026

"Organizational Culture for Community Associations – Let's Get Intentional" *Community Assets* January-February 2025

"Time Management, Multitasking & Other Myths" *Community Assets* May-June 2023
Updated and Expanded Version of 2014 Article

"8 Characteristics of a Great Board – Management Relationship" *Currents* Q4 2021

"Dream Catchers – How to Lead Your Association from Good to Great" *Quorum* November-December 2020 *Organizational Culture in Community Associations*

"Dream Catchers – How to Lead Your Association to the Gold" *Community Assets* November 2020
Organizational Culture in Community Associations

"Culture is the Key to Retention" *Quorum*, June 2019

"Dear Boards – Suck It Up & Be Transparent" *Currents,* Q4 2018

"So You Think You Are a Good Listener? And Other Delusions" *Quorum*, October 2018

"Hit the Target – Long Range Planning for Community Associations" *Quorum*, July 2015

"Time Management, Multi-Tasking & Other Myths" *Quorum*, June 2014
Key points included in seminar. Reprinted in the newsletters of the Central Virginia and Pennsylvania/Delaware Valley Chapters of CAI

*"*Managing in the Workplace*" Quorum, August 2013*
Best practices in human resource management

"When Water Is Not Your Friend" *Quorum*, December 2011
Planning for preventive maintenance

"Building the Association Budget" *Montgomery County Commission on Common Ownership Communities Newsletter,* Fall 2011

"Tell Me Where It Hurts (When and Why Should a Board Consider Hiring a Consultant)" *Quorum,* September 2008

"Wild One" *Common Ground.* July/August 2007
Dealing with disagreeable board members

PUBLISHED ARTICLES (CONTINUED)

"The Risks & Rewards of Managing Developing Communities" *Quorum,* October 2006

"The 'L' Word" *Common Ground*, July/August 2006
Leadership perspectives for board members

"Mea Culpa – Now I Think I am Beginning to Get It" *Quorum*, August 2006
Benefits of embracing continuing education

"CAI Education & Your Career Path" *Quorum,* August 2006

"The Party's Over – Now What? - Maintaining Perspective & Balance in the Wake of a Terminated Business Relationship" *Quorum*, February 2005

"Raising the Bar – A Leadership Perspective for Professional Managers" *Quorum*, August 2004

"Making Connections – Looking Beyond Community Borders" *Quorum,* September 2002

ADVANCED COURSEWORK

M-310 – "Management Company Administration" - Community Associations Institute
M-360 – "Leadership Practices in Building Community" - Community Associations Institute
M-370 - "Managing Developing Communities" - Community Associations Institute

INDUSTRY LEADERSHIP

- Washington Metropolitan Chapter – Community Associations Institute: Formerly served as Conference & Expo Committee Chair, Education Council Chair, and Board Member
- Community Associations Institute: National Faculty Member – M-100 Course Instructor (2018-2024)
- Virginia Leadership Retreat: Committee Member
- Keystone Chapter – Community Associations Institute: Content & Communications Committee, formerly Chair, currently Member

HONORS AND AWARDS

- *Article of the Year (People's Choice Award)*, Central Virginia Chapter Community Association Institute 2026
- *Educator of the Year (People's Choice Award)*, Central Virginia Chapter Community Association Institute 2024
- *Educator of the Year*, Washington Metro Chapter Community Association Institute 2005, 2006, 2013 & 2014
- *Hall of Fame,* Washington Metro Chapter Community Association Institute 2014
- *Chapter Appreciation Award,* Washington Metro Chapter Community Association Institute 2007, 2023

HONORS AND AWARDS (CONTINUED)

- *Committee Chair of the Year*, Washington Metro Chapter Community Association Institute 2004
- *Rising Star Award,* Washington Metro Chapter Community Association Institute 2003