

TAILWIND GROUP'S 4TH ANNUAL

# OPERATIONS & BUDGET *Summit*

APRIL 15 - 18, 2024 | MANKATO, MN

# OBS 2024 SPONSORS *Thank you!*

**FIRST CLASS** - *A Night at 30,000 Feet Dinner & Awards Sponsor*



entrata

**BUSINESS CLASS** - *Team Builder Sponsor*



BECK'S  CUSTOM  
AUDIO & VIDEO



Colliers

Mortgage



DICKSON  
FURNITURE MANUFACTURERS

**MAIN CABIN** - *Social Hour Sponsor*



ACT  
Advance Catastrophe Technologies  
A COTIUM COMPANY



Chadwell  
SUPPLY



ICS   
ADVANCED TECHNOLOGIES



LEDGE®



LEONARDO<sup>24/7</sup>



POPIC  
CAPTIVE SOLUTIONS  
& RESIDENT PROGRAMS



  
Sustainable

**PREMIUM ECONOMY**  
*Event Sponsor*



opinion 

**ECONOMY** - *Event Sponsor*



 Copeland  
TECHNOLOGY SOLUTIONS



 ePropertyCare



 Valet Living  
Setting the Standard®

# TABLE OF CONTENTS

WELCOME .....	PAGE 3
IMPORTANT VENUE INFORMATION .....	PAGE 4
IMPORTANT CONTACT INFORMATION .....	PAGE 4
ITINERARY .....	PAGE 5-6
EMPLOYEE HEADSHOT SCHEDULE.....	PAGE 7
DINNER & AWARDS CEREMONY .....	PAGE 8
FOOD MENU .....	PAGE 9
SUMMIT SEATING CHART .....	PAGE 10

*Posting on social this week?*   

INCLUDE THE HASHTAGS **#TAILWINDGROUP**  
AND **#OBS2024** IN YOUR CAPTIONS.  
DON'T FORGET TO TAG **@TAILWINDGROUP** TOO!



# WELCOME TO OBS 2024

Dear Attendees,

It's a privilege for me to welcome all of you to our 4th Annual Operations & Budget Summit – more commonly referred to as OBS! As a first-time attendee to OBS, I'm personally looking forward to meeting all our OBS attendees and engaging with our Operational, Accounting, Finance, Administrative, Senior Leadership teams and vendors that so greatly support our properties. We continue to be intentional about convening our Teams to share information and brainstorm ideas that will improve all our real estate assets – owned or managed.

We have created significant change year-over-year since the inaugural OBS summit in 2021 and in keeping with that spirit, highlighted below are some of our most recent achievements.

- Budgeting process – we continue to improve our annual budget process and this year we created a budget calendar coupled with an outline of key processes, and responsible parties along with a new budget preparation template to streamline our process and drive accuracy and efficiency. Through this process, we have completed DRAFT budgets in advance of OBS! This will allow more time to complete preleasing, prepare for turnover, and focus on our overall mission of improving the Resident Experience!
- Entrata operating platform – training and migration began in early March with (3) Mankato properties successfully transitioned. The 2nd tranche of properties happened the week of April 8th and we'll complete the migration of all properties by September 2024. The Entrata platform provides “real-time” access to data and allows for more vertical integration (fewer ancillary applications) – e.g., leasing, rent roll reporting, maintenance orders, etc.
- Corporate Operations Team – addition of (2) Regional Maintenance Managers in December 2023 to aid all properties in day-to-day maintenance, turnover, and capital projects by creating and implementing best practices.
- Through continued growth we now have more than 15,300 beds with over \$1.1B in assets under management and 325 Team Members that contribute to the success of our organization!

As we continue to face new opportunities to grow our Company, we frequently ask the question “How will this impact our people?” – because we genuinely care about each of you and your families. So, on behalf of the Owners and the Senior Leadership Team, we are grateful to each of you and we're glad that you're a part of our Team!

Please enjoy the time to learn from each other over the coming week and we hope that you engage in and enjoy all the activities . . . have a great week!



*Tam Seigfried*

Vice President of Finance



# VENUE INFO

## LODGING:

Hilton Garden Inn  
20 Civic Center Plaza  
Mankato, MN 56001

*Hotel rooms will be direct billed to Tailwind Group; however, they will require you to put your credit card down for incidentals at check-in.*

## TAILWIND GROUP OFFICE:

Profinium Place  
100 Warren Street - 7th floor  
Mankato, MN 56001

## OBS VENUE:

Sky One Eleven Event Space  
111 South 2nd Street - 7th floor  
Mankato, MN 56001

## TEAM BUILDING VENUE

Sky One Eleven Event Space  
111 South 2nd Street - 7th floor  
Mankato, MN 56001



## Contact Info



### BRANDON SMITH

VP, Operations & Development  
507-995-6431



### WHITNEY DICKINSON

Communication &  
Employee Experience Manager  
515-231-1652



### COLLEEN LEWTER

Director of Corporate Operations  
517-242-2698



### KATE WALTERS

Director of Accounting  
612-205-3006



### JAYME EDIN

Director of Asset Management  
984-322-1778

## MONDAY, APRIL 15 - DAY 1

Travel + Afternoon Sessions + Dinner - *Business Casual Attire*

Time	Presenter/Participants	Topic
8 am - 3 pm		Travel
3 pm		Welcome & Introductions
3:30 PM	Brandon Smith	Overview of the Week
6 pm		Team Dinners

Our IT team will be helping with computer cleaning throughout the event

## TUESDAY, APRIL 16 - DAY 2

All Day Sessions + Team Builder Event - *Business Casual Attire*

**NOTE - EMPLOYEE HEADSHOT DAY 1 of 2** The marketing team is offering new headshots for website and social media. If your headshot from last year is preferred, you have the option to pass. Please look for your scheduled time and suggested attire on page 7.

Time	Presenter/Participants	Topic
8:15 AM	Breakfast	
8:30 AM	Lane Gravley	Welcome
8:45 - 10 AM	All	Dr. Cindra Kamphoff
10 - 10:15 AM	All	Break
10:15 - 11 AM	Betsy Elzen	Portfolio Benchmarking
11 AM - 12 PM	All	Budget Workshop
	<i>Budget Workshop: Summary of sites completed draft budgets will be provided</i>	
12 - 1 PM	All	Lunch
1 - 1:45 PM	Corey Lavigne, Todd Montgomery, & Colleen Lewter	Maintenance Managers & Property Managers - The Successful Operations Marriage
1:45 - 2:45 PM	Colleen Lewter, John Warren, Jenna James, Andrew Ward, Shelby Schreck, & Alex Lumley	Resident Experience
2:45 - 3 PM	All	Break
3 - 4 PM	Corey Lavigne & Todd Montgomery	Group Sessions: Maintenance Topics
	<i>Maintenance Topics: Budgeting &amp; Cost Control, Customer Service, Continuous Improvement Initiatives, Property Manager &amp; Maintenance Managers Working Together</i>	
4 - 4:30 PM	Kristin Moorhouse, Alissa Ford, & Dani England	Concur
4:30 - 4:45 PM	Jackson Buda	Accounting Vendor Change Form
4:45 PM		Event Wrap-Up

## TUESDAY, APRIL 16 - DAY 2

"Nailed It" Tailwind Group Team Building Event - *Casual Attire*

Time	Presenter/Participants	Topic
6 PM	All	Dinner
6:30 PM	All	Team Builder Begins
8:00 PM	All	Voting
8:30 PM		Event Wrap-Up

## WEDNESDAY, APRIL 17 - DAY 3

All Day Sessions - *Business Casual Attire*

**NOTE - EMPLOYEE HEADSHOT DAY 2 of 2** The marketing team is offering new headshots for website and social media. If your headshot from last year is preferred, you have the option to pass. Please look for your scheduled time and suggested attire on page 7.

<i>Time</i>	<i>Presenter/Participants</i>	<i>Topic</i>
8:15 AM	All	Breakfast
8:30 - 9:30 AM	Property Accounting Team	Accounting Interactive Game
9:30 - 10 AM	Paige Solie, Tara Eisele, & Kelsi Hearth	Secret Shop Overview and Updates
10 - 10:15 AM	All	Break
10:15 - 11 AM	Mandy Schackow & Krystal Pierce	Conflict Masterclass
11 - 11:30 AM	Zach Rubosky	Interviewing & Feedback Process
11:30 AM - 12:30 PM	Emily Adams, Kyla Larson, Jericho Salzman-Ney, & Mandy Schackow	Leadership Book Review
12:30 - 1:15 PM	All	Lunch
1:15 - 1:45 PM	Senior Leadership	State of the Industry and Q&A
1:45 - 2:45 PM	Lane Gravley	Empowering Others
2:45 - 3 PM	All	Break
3 - 3:45 PM	Colleen Lewter, Mallory Kelley, Christie Hunter, Kory Theil, & Lisa Watson	Growing Laterally, Before You Can Grow Vertically
3:45 - 4 PM	David Hughes	General Entrata Update
4 - 4:15 PM	Lane Gravley	Tailwind Organizational Structure Update
4:15 PM		Event Wrap-Up

## WEDNESDAY, APRIL 17

Dinner & Awards Ceremony - *Cocktail Attire in Black, Silver, or Royal Blue*

<i>Time</i>	<i>Presenter/Participants</i>	<i>Topic</i>
6:00 PM	All	Social
6:30 PM	All	Dinner
7:30 PM	All	Awards
9:00 PM	All	Group Photo
10:00 PM	All	Event Wrap-Up

## THURSDAY, APRIL 18 - DAY 4

Vendor Trade Show - *Business Casual Attire*

<i>Time</i>	<i>Presenter/Participants</i>	<i>Topic</i>
8:30 AM	All	Breakfast
9 AM	All	Trade Show Begins
11:30 AM	All	Trade Show Ends
12 PM	All	Event Wrap-Up + Travel

**TUESDAY, APRIL 16**

8:15–8:30 am	During Breakfast	Dominique Swanson, Lizzy O'Neil, Kimberly O'Connell, Karoline Brown, Betsy Elzen, Dani England
10–10:15 am	During Break	Brett Porter, Mariah Fordyce, Nicky Tyus, Sara Marthaler, Cortavious Givens, Samantha Nordlie
12–12:15 PM	During Lunch	Dylan Parnell, Mario Hervey II, Emily Harp, Avery Kalil, Ben Rudnicki, Sheila Helland
12:15–12:30 PM	During Lunch	Tara Jeffries, Michaela Dudenhoeffer, Kayla Montgomery, Liv Lemus, Alex Lumley, Alexis Whited-Gant
12:30–12:45 PM	During Lunch	Faith Acosta, Andrew Ward, Katie Lippincott, Amy Noble, Shantai McDaniel, Jackson Buda
12:45–1 PM	During Lunch	Jenna James, Jennifer Campbell, Ashley Early, Emily Te Brink, D'Andre Webb, Courtney Bailey
2:45–3 PM	During Break	Amber Edick, MaKayla Kies, Jonathan Erdmann, Shelby Shreck, John Warren, Zach Kaufenberg, Brian Hurley
3–3:15 pm	During Group Sessions	Nicole Busch, Carli Davis, Farrah Falcone, Naqib Ahmed, Emma Wyffels, Dylan Gregory

**WEDNESDAY, APRIL 17**

8:15–8:30 am	During Breakfast	Alissa Ford, Chad Friedrichs, Mike Kaufman, Kristin Moorhouse, Madeline Smith, Kate Walters, Jayme Edin, Tom Seigfreid
10–10:15 am	During Break	Emily Adams, Jericho Salzman-Ney, Mandy Schackow, Kyla Larson, Todd Montgomery, Corey Lavigne, David Hughes, Logan Suko
12:30–12:45 PM	During Lunch	Devan Schaly-Brumbaugh, Paige Solie, Tara Eisele, Kelsi Hearth, Zach Bishop, Christie Hunter, Kory Theil
12:45 – 1 PM	During Lunch	Mallory Kelley, Lisa Watson, Colleen Lewter, Catherine Clay-Worthy, Whitney Dickinson
1 – 1:15 PM	During Lunch	Kayla Christopherson, Miranda Koeck-Johnston, Zach Rubosky, Molly Anderson, Jen Wanderscheid, Sydney Ziegler, Jon Fahning, Tyler Steeve
2:45–3 PM	During Break	Krystal Pierce, Natalie Stubbs, Sherri Hupp, Betsy Theil, Bryce Andrews, Nick Sheak, Brody Nielsen, Michael Phan
6–6:15 PM	During Social Hour	Brandon Smith, Lane Gravley, Michael Sather, Landon Smith, Kyle Smith

*Suggested Attire -*

Note: Photo will be taken from the waist up. Suggested attire includes Blazers, Button Ups, Blouses, or Tailwind/Site Polo. Solid and neutral colors look great. Avoid patterns and any loud jewelry.



**A NIGHT AT 30,000 FEET**

# *Diamonds in the Dark*

## **TAILWIND OPERATIONS AND BUDGET AWARDS CEREMONY 2024**

*Cocktail attire in black, silver, or royal is requested for our themed evening*



## **2024 AWARD CATEGORIES**

### **ON-SITE INDIVIDUAL AWARDS**

Property Manager of the Year  
Resident Services Manager of the Year  
Maintenance Professional of the Year  
Newcomer of the Year (Management)  
Newcomer of the Year (Maintenance)

### **CORPORATE INDIVIDUAL AWARDS**

Operations Team Member of the Year  
Corporate Team Member of the Year  
Finance & Investments Team Member of the Year  
Corporate Newcomer of the Year

### **ON-SITE TEAM AWARDS**

Largest NOI % Increase Year-Over-Year  
Largest NOI \$ Increase Year -Over-Year  
Best Renewal % In Portfolio  
Best Rent Collection % In Portfolio  
Best Resident Reputation in Portfolio

### **ON-SITE TEAM CERTIFICATES**

Living the Difference: Renewal Award  
Rent Collection



**MONDAY, APRIL 15** – *Team Dinners (various locations)*

**TUESDAY, APRIL 16**

**Breakfast** – Brunch Buffet: *Scrambled Eggs, Bacon, Sausage, Cinnamon Rolls, Bagels & Cream Cheese, Fruit, Yogurt, Granola, and Biscuits & Gravy.*

**AM Break** – Charcuterie Boards

**Lunch** – Taco Bar *with guacamole, onion, jalapenos, and refried beans*

**PM Break** – Fresh Baked Bars

**Dinner** – Pizza Bar *with assorted pizzas*



**WEDNESDAY, APRIL 17**

**Breakfast** – Brunch Buffet: *Scrambled Eggs, Bacon, Sausage, Cinnamon Rolls, Bagels & Cream Cheese, Fruit, Yogurt, Granola, and Biscuits & Gravy.*

**AM Break** – Assorted Cheese Platter w/Crackers + Fruit Platter

**Lunch** – Sandwich Buffet served with chips & cookies:

- Carnitas Pork Sandwich: *Shredded pork piled on a Kaiser roll served with BBQ sauce and pickles*
- Chicken Ranch Wrap: *Sliced grilled chicken, lettuce, tomato, pepper jack cheese, and ranch dressing on a cheddar tortilla.*
- California Club Wrap: *Ham and turkey, bacon, American cheese, lettuce, tomato, onion, and basil aioli on a jalapeno tortilla.*
- Vegetable Wrap: *Mushroom, red pepper, onion, spinach, goat cheese, and balsamic dressing on a garden vegetable tortilla.*

**PM Break** – Popcorn and Party Mix

**Pre-Dinner Appetizers** – Spinach Artichoke Dip, Caprese Skewers, and Queso Dip with Smoked Chicken

**Plated Dinners** –

- Pesto Cavatappi: *Roasted red pepper, sun-dried tomatoes, chicken, and pesto cream sauce, served with garden salad and bread.*
- New York Strip Steak: *10oz aged beef with roasted fingerling potatoes and garden vegetables, served with garden salad and bread.*
- Champagne Chicken: *Roasted breast of chicken with champagne cream sauce garlic mashed potatoes and roasted asparagus, served with garden salad and bread.*
- Grilled Eggplant: *Fresh mozzarella with marinara sauce over parmesan and risotto.*

**THURSDAY, APRIL 18**

**Breakfast** – Brunch Buffet: *Scrambled Eggs, Bacon, Sausage, Cinnamon Rolls, Bagels & Cream Cheese, Fruit, Yogurt, Granola, and Biscuits & Gravy.*

**TABLE 1**

Dominique Swanson  
Lizzy O'Neil  
Kimberly O'Connell  
Karoline Brown  
Betsy Elzen  
Dani England

**TABLE 2**

Brett Porter  
Mariah Fordyce  
Nicky Tyus  
Sara Marthaler  
Cortavious Givens  
Samantha Nordlie

**TABLE 3**

Dylan Parnell  
Mario Hervey II  
Emily Harp  
Avery Kalil  
Ben Rudnicki  
Sheila Helland

**TABLE 4**

Tara Jeffries  
Michaela Dudenhoeffer  
Kayla Montgomery  
Liv Lemus  
Alex Lumley  
Alexis Whited-Gant

**TABLE 5**

Faith Acosta  
Andrew Ward  
Katie Lippincott  
Amy Noble  
Shantai McDaniel  
Jackson Buda

**TABLE 6**

Jenna James  
Jennifer Campbell  
Ashley Early  
Emily Te Brink  
D'Andre Webb  
Courtney Bailey

**TABLE 7**

Amber Edick  
MaKayla Kies  
Jonathan Erdmann  
Shelby Shreck  
John Warren  
Zach Kaufenberg  
Brian Hurley

**TABLE 8**

Alissa Ford  
Chad Friedrichs  
Mike Kaufman  
Kristin Moorhouse  
Madeline Smith  
Kate Walters  
Jayme Edin  
Tom Seigfreid

**TABLE 9**

Emily Adams  
Jericho Salzman-Ney  
Mandy Schackow  
Kyla Larson  
Todd Montgomery  
Corey Lavigne  
David Hughes  
Logan Suko

**TABLE 10**

Devan Schaly-Brumbaugh  
Paige Solie  
Tara Eisele  
Kelsi Hearth  
Zach Bishop  
Christie Hunter  
Kory Theil

**TABLE 11**

Mallory Kelley  
Lisa Watson  
Colleen Lewter  
Catherine Clay-Worthy  
Whitney Dickinson

**TABLE 12**

Brandon Smith  
Lane Gravley  
Michael Sather  
Landon Smith  
Kyle Smith

**TABLE 14**

Kayla Christopherson  
Miranda Koeck-Johnston  
Zach Rubosky  
Molly Anderson  
Jennifer Wanderscheid  
Sydney Ziegler  
Jon Fahning  
Tyler Steeve

**TABLE 15**

Nicole Busch  
Carli Davis  
Farrah Falcone  
Naqib Ahmed  
Emma Wyffels  
Dylan Gregory

**TABLE 16**

Krystal Pierce  
Natalie Stubbs  
Sherri Hupp  
Betsy Theil  
Bryce Andrews  
Nick Sheak  
Brody Nielsen  
Michael Phan

**TABLE 17**

Karlie Williams (Entrata)  
Kris Benson (Dickson)  
Jason Beck (Beck's)  
Brett Olson (Colliers)  
Joe Lindberg (Colliers)  
Jason Van Dyke (ICS)  
Ashley Ishmael (ICS)  
POPIC Presenter (POPIC)

**TABLE 18**

James Sirmans (eProperty Care)  
Eric Posa (Copeland)  
Shana Pelzel (Ledge)  
Melissa Mascione (Ledge)  
Brent Cameron (Systainable)  
Alex Bennett (Opiniion)  
Matt Nebel (Chadwell)  
Quinn Schaller (ACT)

*Come visit Tailwind's  
Corporate Office!*



# TAILWIND group

ENBERENS

PROFINIUM

Abdo

WORKSPACE

NORTH RISK PARTNERS kato

← Poplar St  
Warren St →

PROFINIUM

BANKING MORTGAGE INSURANCE TRUST

