

# Nuts and Bolts of Asset Management



**WHEN:** March 13th & March 14th or March 15th & 16th

**DURATION:** 9am to 5pm daily

**WHERE:** 703 Atlantic Avenue, Alameda, CA, 94501

**COST:** \$300 for non-profit or PHA attendee

## Administrative Details

- Spaces are limited. Spaces can only be held once payment is received.
- Refunds will not be offered unless we are over subscribed and can fill your spot
- If you are unable to attend, another person from your agency may substitute.
- If the first class fills up, we may offer a second session the same week.
- Meals and lodging are not provided. There are restaurants and hotel within walking distance.
- Free parking on site.
- 10 minutes from Oakland airport.
- This is the first course in the Asset Management Specialist designation from CHAM. To learn more please visit: [www.https://www.chamonline.org/asset-management-specialist-certificate/](https://www.chamonline.org/asset-management-specialist-certificate/)

**Nuts and Bolts of Asset Management** is an interactive and engaging workshop designed for housing practitioners and board members. The course includes an overview of key property asset management concepts, theories and responsibilities, including:

- The **double bottom line** concept of affordable housing ownership – the theory of steering properties toward both business and mission-based goals and outcomes.
- Key asset management functions and responsibilities through the **life stages of property** – planning, construction, lease up, operations and disposition – with a focus on the critical interrelationship between these stages.
- Basic number-crunching of **key property performance indicators** designed to increase understanding of these indicators, as well as their relationship to financial and operational health and long-term viability. This includes revenue, occupancy, expense and financial ratios as well as trend projection analysis.
- Training on the **review and analysis of property financial reports and property/partnership audits** as well as best practices for tracking, measuring and assessing progress toward key operational and financial performance.

## Asset Management Specialist designation (AMS):

While this interactive workshop can be taken as a stand alone course, we highly recommend you see it as the first part of the Asset Management Specialist designation (AMS). The AMS program is a three part series of courses that will ground you in the fundamentals of asset management and property performance. To learn more please visit [www.chamonline.org/trainings](http://www.chamonline.org/trainings).

**Who this course is for:**

- New employees starting their career in asset management.
- Board members and thought leaders of organizations and communities needing a refresher course to support their problem solving initiatives.
- Property managers or other housing professionals who work “on the ground” with multiple parties requiring them to learn the tools of asset management.
- Executives who supervise asset managers, property managers, and asset management professionals and need a foundational understanding of their team’s work.

**Hear what folks who’ve taken our programs have to say:**

“The CHAM curriculum takes you from just seeing the individual assets to seeing the portfolio as a whole and its overall impact on the organization. I now look at our portfolio in a more strategic manner, looking for opportunities, identifying weaknesses, and building up strengths.”

– **Katherine Fleming, Senior Vice President of Portfolio, Bridge Housing**

“The knowledge and insight provided by these training sessions has really helped me step up into my new role as the Program Manager for Housing Development. Truly, credit goes to CHAM for their partnerships and training because without those my career wouldn’t have been possible. Again thank you!”

– **Brittany Winnier-Ociepka, Program Manager Housing Development, Penquis**

# Meet the Trainer, Jack Geary

Jack Geary has over 40 years of affordable housing asset management and real estate development experience in the not for profit and public housing sectors, including 30 years as a trainer.

Jack is a former public housing resident and is the retired Director of Operations for the Cambridge (MA) Housing Authority. Jack has served as Assistant Director of the San Francisco Housing Authority and held several management positions with the Boston Housing Authority. Jack has also served as Director of Urban Edge Property Management (Boston) and as Senior Financial Advisor for DC Housing Enterprises, the nonprofit development affiliate of the Washington DC Housing Authority.

# To Register, please review below

**Name:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

- Please indicate which session you will attend either **March 13/14 or 15/16**
- Email this completed form to Jasmine Polar at [jpolar@alamedahsg.org](mailto:jpolar@alamedahsg.org)
- Payment via check is due immediately upon registration
- Checks need to be payable to Alameda Housing Authority and mailed to 701 Atlantic Avenue, Alameda, CA, 94501. Attention: Jasmine Polar



To learn more about this course, scan above.