

Category	Competency	Rating	Comments
		Needs Development; Competent; Expert	
Business Acumen			
Financial Acumen	Understands NOI, budgeting, and financial reporting		
Financial Acumen	Able to analyze financial statements and identify trends		
Financial Acumen	Can develop and oversee capital plans		
Financial Acumen	Understands funding sources and debt structuring		
Regulatory Knowledge			
Regulatory Knowledge	Knowledge of LIHTC, HUD, and bond compliance		
Regulatory Knowledge	Understands fair housing regulations and reporting requirements		
Regulatory Knowledge	Able to navigate federal, state, and local regulations		
Regulatory Knowledge	Understands income averaging and compliance monitoring		
Operational Oversight			
Operational Oversight	Monitors occupancy, rent growth, and expense control		
Operational Oversight	Oversees capital expenditure projects and maintenance planning		
Operational Oversight	Understands property management functions and performance drivers		
Operational Oversight	Can troubleshoot operational inefficiencies		
Portfolio & Performance Management			

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Portfolio & Performance Management	Sets and tracks key performance indicators (KPIs)		
Portfolio & Performance Management	Understands how to optimize portfolio returns		
Portfolio & Performance Management	Balances workload across multiple properties		
Portfolio & Performance Management	Develops strategic plans for asset improvement		
Resyndication Expertise			
Resyndication Expertise	Understands LIHTC resyndication process and timelines		
Resyndication Expertise	Can coordinate with finance, legal, and development teams		
Resyndication Expertise	Manages tenant relocation and compliance requirements		
Resyndication Expertise	Able to analyze financial feasibility of resyndication		
Acquisitions & Dispositions			
Acquisitions & Dispositions	Understands market analysis and due diligence processes		
Acquisitions & Dispositions	Can evaluate investment opportunities and risks		
Acquisitions & Dispositions	Able to negotiate and structure acquisitions and sales		
Acquisitions & Dispositions	Understands tax credit implications on acquisitions/dispositions		

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New Construction Oversight			
New Construction Oversight	Works with development teams on project feasibility		
New Construction Oversight	Understands proformas, construction budgets, and funding sources		
New Construction Oversight	Able to track construction progress and compliance milestones		
New Construction Oversight	Can transition properties from development to operations effectively		
Technology & Data Analytics			
Technology & Data Analytics	Proficient in Power BI, RealPage, Yardi, and financial modeling tools		
Technology & Data Analytics	Uses data analytics to drive decision-making		
Technology & Data Analytics	Understands how to implement and improve asset management systems		
Technology & Data Analytics	Can leverage technology for reporting and tracking KPIs		
Leadership & Team Collaboration			
Leadership & Team Collaboration	Coaches and mentors team members effectively		
Leadership & Team Collaboration	Collaborates with multiple stakeholders including property managers		
Leadership & Team Collaboration	Manages cross-functional teams and fosters a positive culture		

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Leadership & Team Collaboration	Can align team goals with company objectives		
Communication & Stakeholder Management			
Communication & Stakeholder Management	Able to present data and insights to executives and investors		
Communication & Stakeholder Management	Communicates effectively with property management teams		
Communication & Stakeholder Management	Can manage relationships with lenders, syndicators, and agencies		
Communication & Stakeholder Management	Understands the importance of transparency and accountability		
Strategic Thinking & Problem-Solving			
Strategic Thinking & Problem-Solving	Able to anticipate risks and create mitigation strategies		
Strategic Thinking & Problem-Solving	Understands long-term asset positioning and value creation		
Strategic Thinking & Problem-Solving	Uses data-driven decision-making for asset strategy		
Strategic Thinking & Problem-Solving	Thinks critically and adapts to changing market conditions		