



# CHAM

## ASSET MANAGEMENT CONFERENCE

**Optimizing Asset Management Teams  
for Performance & Impact**



**NEW ORLEANS**  
**JUNE 9-11, 2025**  
Sheraton Hotel

# Speakers

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- Wanda Langley-Hardy  
SVP, Asset Management, April Housing
- Nina Lee Alhambra  
COO, April Housing
- Sonya Prear  
VP, Asset Management, CAHEC

# Agenda

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Goal: To provide affordable housing owners and operators with a framework for building and managing a high-performing asset management team.

This workshop will cover how to:

- ❖ Assess talent needs,
- ❖ Determine the number of asset managers required,
- ❖ Assign portfolios effectively, and
- ❖ Establish a strong team culture through coaching and mentoring.

# Poll 1 – Show of Hands: Who's In the Room?

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- A) Asset Manager
- B ) Property Manager
- C) Syndicator
- D) Developer/Owner
- E) Other

# Optimizing Asset Management Teams for Performance & Impact

## Assessing Talent Needs

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### **A. Identifying Skills & Competencies Required**

- Financial acumen (NOI growth, budgeting, capital planning)
- Regulatory knowledge (LIHTC, HUD, bond financing)
- Operational oversight & problem-solving
- Relationship management with property managers, general partners/owners, lenders, and stakeholders
- Strategic thinking & performance optimization

### **B. Determining the Number of Asset Managers Needed**

- Portfolio size & complexity considerations
- Industry benchmarks: AM-to-property ratios
- Balancing workload to prevent burnout
- Factoring in special projects & resyndication needs

### **C. Interactive Exercise: Talent Assessment Framework**

- Utilize the provided checklist to assess the competencies of your current team and identify gaps

# Poll 2

Open this session in the conference app to respond.

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Which skill do you find most challenging to assess in potential asset managers?

- A) Financial acumen
- B) Regulatory knowledge
- C) Operational oversight
- D) Relationship management
- E) Strategic thinking

[Click Here for Results](#)

# Portfolio Assignment Strategy

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## **A. Portfolio Structuring Approaches**

- Geographic-based vs. relationship-based vs. property-type-based portfolios
- Allocating properties based on complexity, risk level, or ownership type
- Matching asset managers to strengths and experience

## **B. Balancing Workloads for Performance Optimization**

- Avoiding overloading top performers
- Adjusting portfolios to account for acquisitions, dispositions, and special initiatives
- Setting KPIs for workload distribution

## **C. Case Study Discussion: Real-World Portfolio Assignment Challenges**

- Small group discussion on best practices and lessons learned

# Poll 3

Open this session in the conference app to respond.

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How do you currently structure your asset management portfolios?

- A) Geographic-based,
- B) Property-type-based,
- C) Complexity/Risk level-based,
- D) Ownership type-based, Other

[Click Here for Results](#)

# Establishing a Strong Team Culture

*"Culture isn't just what you say, it's what you consistently do how you show up, support one another, and hold the line when it's tough. A strong team culture turns shared values into shared victories."*

## **A. Defining Core Values & Team Mission**

- Aligning asset management culture with company objectives
- Encouraging accountability, collaboration, and proactive problem-solving

## **B. Communication & Collaboration Strategies**

- Regular team meetings and one-on-ones
- Cross-functional collaboration with property management, finance and development teams
- Leveraging technology for transparency (Monday.com, Power BI, RealPage, etc.)

## **C. Fostering a Positive & Inclusive Environment**

- Psychological safety and open feedback loops
- Recognizing and rewarding achievements
- Building team camaraderie through retreats, learning opportunities, and shared goals

# Poll 4

[Click Here for Results](#)

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What is the biggest challenge you face in building a strong team culture?

- A) Aligning with company objectives
- B) Encouraging accountability
- C) Effective communication
- D) Fostering inclusivity
- E) Recognizing achievements
- F) Work Life Balance

# Coaching & Mentoring to Achieve Goals & Objectives

*"Great coaching doesn't just guide—it ignites potential. Through mentoring, we turn vision into action and goals into accomplishments."*

## **A. Leadership's Role in Developing Asset Managers**

- Coaching vs. micromanaging: Finding the balance
- Providing constructive feedback & professional development opportunities

## **B. Setting Clear Performance Expectations**

- Establishing measurable goals (Occupancy, NOI, collections, compliance metrics)
- Performance reviews & individual development plans

## **C. Mentorship & Career Growth Strategies**

- Pairing new asset managers with experienced mentors
- Encouraging industry certifications & continued education
- Creating a succession pipeline for leadership positions

## **D. Role-Playing Exercise: Coaching Conversations**

- Practice delivering feedback and coaching team members on real-world challenges

# Closing Thoughts and Q&A

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## **A. Key Takeaways Recap**

- ✓ Talent assessment,
- ✓ Portfolio structuring,
- ✓ Culture-building,
- ✓ Coaching strategies

## **B. Open Discussion & Questions**

- ✓ Share your insights and challenges for your organization

## **C. Handouts:**

- ✓ Asset Management Team Structuring Guide
- ✓ Key Performance Indicators for AM Teams
- ✓ Talent Assessment Tool

# Golden Nuggets from Session

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*As we close, remember:*

*High-performing asset management teams don't happen by accident—they're built through intentional portfolio alignment, a strong and supportive culture, and a commitment to coaching and development.*

*When we optimize structure and invest in people, we don't just meet goals—we surpass them and create lasting impact.*

Thank you for your participation!

**TAKE A MOMENT TO  
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THE MOBILE APP**

**Your feedback is important.**

