

2024 Financial Management Conference

Portfolio Optimization

Tatiana Blank, Eden Housing, CFO

Katherine Fleming, EAH, Chief Portfolio Officer

Pedro S. G. Rodriguez, Coachella Valley Housing Coalition, ED & CEO

Alvin Saafir, Community Housing Capital, SVP & Chief Credit Officer

Harold Nassau, HCNassau Consulting

Sept. 4, 2024

STRENGTHMATTERS[®]



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session using the **QR code**. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. Please see the session host (the person monitoring the sign-in process) if you prefer a paper evaluation.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Questions

- We will pause during presentation and again at the end for Q&A.

Introduction

Landscape and Trends

Poll #1

How many of you have sold a property in
past two years?

Challenges and Headwinds

- Uncollected rent and bad debt
- Staffing
- Expenses and inflation
- Insurance
- Special needs and challenging populations
- Interest rates
- ?

Poll #2

How many of you are thinking of selling a property in next 18 months?

Strategies to Maximize Revenue

- Max rents
- Drive overhead down to properties
- Maximize use of reserves
- Collect all reimbursements
- Collect as many fees as possible

Strategies to Improve Performance

- Optimize property management structure: blend 3rd party and self-management
- Build asset management capacity and organizational position
- Standardize purchasing

POLL #3

How many of you are trying to add asset management staff?

REPOSITIONING

- Hidden assets in portfolio
- Bridging to recapitalization

Selling

- Organizational Stability and Mission
- Portfolio focus and organizational strengths
- Cash drains? Cash cows?

Poll #4

How many of you are beginning to track asset values?

Portfolio Balance

- Right sizing, focus and efficiency
- Geography and markets
- Acquisitions

Disposition Policy and Mission

Poll #5

What would you consider an achievable improvement in property performance? 5% 10% 15% 20%+ ?

Q&A

Evaluation Reminder

- Please submit all conference evaluations. Use the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

CONTACT INFORMATION

Harold Nassau haroldnassau@outlook.com

(617) 877-5489

Tatiana Blank

Tatiana.blank@edenhousing.org

(650) 515-5730

Katherine Fleming

katherin.fleming@eahhousing.org

((707) 280-9026

Pedro Rodriguez

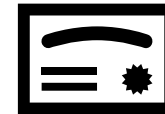
pedro.rodriguez@cvhc.org

(760) 578-7133

Alvin Saafir

asaafir@communityhousingcapital.org

(678) 904-1307



Lindsay Wells

(CPE credit contact)

consult.lwells@gmail.com

