

Valerie A. Lee, M.S.

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SUMMARY

Residential, commercial, HOA and affordable multi-family housing professional with strong background in asset management, property and portfolio performance analysis, property management, property operations, affordable housing multi-family finance, community development, multi-family housing education and training, accounting, financial management, budget preparation, project management, work plans, variance analysis, maintenance and capital improvements, risk management, vendor negotiations, leasing, and resident services. Experienced in LIHTC, Section 8, HUD multi-family programs, CAM reconciliations, lease administration, Yardi Voyager, Asana, AppFolio, Salesforce. Skilled in re-certifications (initial, annual, and interim), housing choice vouchers, fair housing, rent calculations, and landlord tenant laws.

PROFESSIONAL EXPERIENCE

NeighborWorks America

Washington, DC

Senior Manager, Affordable Housing Asset Management

May 2025 - Present

- Design, develop, and manage training content related to asset management for multifamily affordable housing, including emerging trends, best practices, and regulatory compliance.
- Collaborate with subject matter experts, instructors, and other staff to ensure all curriculum content is current, accurate, and aligned with organizational goals.
- Lead content reviews and quality assurance processes, including proofreading and updates.
- Develop and implement strategies for adult learning that enhance participant engagement and knowledge retention across a range of delivery formats (in-person, virtual, hybrid, self-paced).
- Stay informed about developments in affordable housing, property operations, community development, and public policy that impact training needs and content.
- Provide thought leadership and technical expertise in the areas of asset management, affordable housing, risk mitigation, and organizational sustainability.
- Support grant writing, reporting, and proposal development related to training programs and curriculum development.
- Partner across departments to align training with broader capacity-building goals for the network.

Community Housing Development Corporation (CHDC)

Richmond, CA

Asset Manager

June 2024 – April 2025

- Assess financial performance of tax credit and Section 8 multi-family properties, prepare, manage, and monitor budgets to corporate benchmarks, monitor portfolio operational performance
- Monitor project performance relative to proforma
- Ensure long-term sustainability of new affordable tax credit and Section 8 housing developments
- Develop and monitored project cash flow projections, reserve accounts, and capital plans

Habitat for Humanity Greater San Francisco (HGSF)

San Francisco, CA

Community Associations Manager

January 2022 – June 2024

- Help set up new homeowner associations by reviewing and editing governing documents (CC&Rs, Bylaws, Articles of Incorporation, Rules and Regulations), service provider contracts, and warranties
- Ensure that HOAs are established according to applicable laws, best practices and HGSF standards
- Design HOA and homeownership education curriculum and events, including tools and training
- Serve as advisor to 14 Boards of Directors for all legal, financial, and operational matters
- Review HOA finances and Reserve Studies, including profit and loss variances and funding status
- Help select, manage and oversee HOA property managers and other HOA service providers
- Design new HOA key performance indicators to track and analyze data on HOA outcomes/impacts
- Panelist at California Association of Community Managers Law Seminar on Association Elections
- Panelist at the Habitat for Humanity International Conference on Homeowner Associations

BanCal Property Management

San Francisco, CA

Community Association Manager

June 2021 – January 2022

- Manage all aspects of eight homeowner associations exceeding \$3MM in total assets
- Design in-person and virtual educational classes for HOA board members and HOA members
- Serve as the advisor to eight Boards of Directors for all legal, financial, and operational matters
- Develop and manage annual operating budgets and create financial reports
- Track and manage finances, including financial reporting, forecasting, and creating budgets
- Supervise Assistant Community Manager, Resident Manager and on-site maintenance team

East Bay Asian Local Development Corporation

Oakland, CA

Commercial Property Administrator

June 2020 – May 2021

- Responsible for seven commercial properties (1 million square feet), including rent collection, preparing budgets, coordinating tenant build-outs, lease review and administration
- Support the Associate Director with marketing and leasing, project management and financial management using Yardi Voyager, AirCRE, and SignNow

JWilliams

Oakland, CA

Assistant Property Manager

September 2019 – May 2020

- Ensured compliance with tax credit and Section 8 housing programs by reviewing resident
- Verified accuracy of income projections, rent calculations, and utility reimbursements
- Leased apartments and maintained resident functions by using RealPage and Yardi Voyager
- Managed resident files, including rent collection, lease preparation, rent roll reviews, tracking and reviewing lease expirations, service requests, work orders, and rental applications

Charles Schwab & Co.

San Francisco, CA

Financial Consultant Partner

November 2014 – October 2018

- Create and present financial plans, portfolio reviews and investment recommendations
- Manage operational client paperwork including processing complex financial transactions
- Design and taught financial educational workshops for corporations and nonprofit organizations
- Earned maximum bonus award every year based on sales and client relationship management skills

EDUCATION & CREDENTIALS

- California Notary Public Commission #2482101
- California Property and Casualty Insurance License #0E35018
- California Real Estate Salesperson License DRE #02150532
- Certified Occupancy Specialist (COS), National Center for Housing Management
- Tax Credit Specialist (TCS), National Center for Housing Management
- Asset Management Specialist (AMS), Consortium of Housing Asset Management
- Certified Community Association Manager (CCAM), California Association of Community Managers
- Certified Manager of Community Associations (CMCA), Community Association Institute
- Association Management Specialist (AMS), Community Association Institute
- Master of Science in Marketing (High Honors), Golden Gate University, San Francisco, CA
- Bachelor of Arts in English (minor in Journalism), Indiana University, Bloomington, IN