

Chapter 11-04 – Board of Directors – Candidate Questionnaire – 2021

1. What is your motivation for running for the Board of Directors?

I learned as a 21-year-old first-year teacher that community involvement was the foundation for being a positive member of a community. That first involvement has carried through my entire life. In every community where we lived, I have made it a priority to be engaged in community service. Giving my time and energy to my home community has become my passion. Cottonwood Palo Verde is our full-time residence, and giving back to this community - a community that has brought us so much joy - is a just a natural step for me. It is very easy to be motivated to help this wonderful community continue to grow with the times and maintain a great reputation as a destination community.

2. What do you consider to be the primary functions of the Board of Directors?

First, the Board of Directors has the legal, fiduciary responsibility to ensure that all matters of finance are being conducted in an ethical and secure manner. Board members must always remember that all funds are “other peoples” money. The Board of Directors should maintain a collaborative working relationship with the General Manager that challenges the Management Team to deliver our financial and operational goals. The Board is responsible for developing policies that best serve the entire community. All policies should serve the community’s best interest, and ultimately support the lifestyle of a quality Active Adult Community. Policies should be enacted that support the maintenance of property values and keep the community attractive for the next generation of homeowners. Another function/responsibility of the Board is to keep an open ear to the concerns of the homeowners. Functioning with openness and listening to homeowners leads to harmony in a community and is a responsibility of every Board member.

3. Have you ever served as a member of a board of directors? Where, when and for what organization?

Phi Delta Kappa - Council Bluffs, IA 1975-1986

First Bank National Association - Council Bluffs, IA 1985-87

Southwest Iowa Economic Foundation - Council Bluffs, IA – 1984

Area Education Association - Treynor, IA 1981-1986

Council Bluffs Public Library Board - Council Bluffs, IA 1986

Child Care Providers - Council Bluffs, IA 1985

Kiwanis Club - Council Bluffs, IA 1982-1986

Southwest Iowa 501 c3 Educational Foundation - Council Bluffs, IA 1980-2002

Glendale Elementary School Executive Board - Council Bluffs, IA 1983 -1985

Cottage Row Development Corp.- Council Bluffs, IA 1981-1985

Crown Hall Catering and Banquet Corp. - Omaha, NE 1979-2002

Gateway Express, Inc. - Omaha, NE 1997- 2002

Cottage Row Homeowners Association - Council Bluffs, IA. 1983-2002

4. What personal characteristic/skills do you possess that you feel will enhance the performance of the Board?

Excellent knowledge of the operation of a board. Knowledge of parliamentary procedure. Complete knowledge of the operational components of HOA #2. Strong personal skills including strong public speaking skills. Trained in appropriate and professional leadership skills.

5. What is your professional and educational background?

Education: B.A., MS, EDS, PH.D.

Elementary Teacher, Elementary Principal, University Professor. Owner and controlling officer in four businesses. Professional State Labor Mediator, Independent Business Consultant, Educational Consultant for Executive searches.

6. What association amenities do you use?

Have used all the amenities in HOA#2 and still use F&B, golf, tennis, pickleball, bocce ball, Sisk Park putting course, racket ball courts and Fitness Center.

7. List any association committees on which you have served?

Golf Committee
Facilities & Grounds, Current Chair
Audit & Finance, Chair
Election Committee
Recreation Committee
Safety, Security and Access
Food & Beverage

8. How many Board meetings have you attended in the last year?

I have attended two until in-person attendance was discouraged by the HOA and have watched most of the live streaming of both agenda planning and monthly Board meetings.

9. Provide a Bio of 100 words or less suitable for publication.

Born, raised and educated in Nebraska. Earned BA, MS, ED.S. and PH.D. from the University of Nebraska System. Married to Jan for 56 years; have 2 daughters and 6 grandchildren. Lived and worked in Iowa as a Full Professor at the University of Northern Iowa. Was a business consultant and owner of several small businesses. Started visiting Sun Lakes in 1986, purchased a home here in 1997, and became full-time residents in 2002. Previously served or worked with 7 of the 9 SL#2 HOA Standing Committees and served 9 years on the SL#2 HOA Board.