



## **Pat Duncan**

### **Board of Directors - Candidate Questionnaire – 2025**

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

To assist in and contribute to the on-going efforts of developing our short and long-term financial plan.

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

- a. **Accountability:** for and on behalf of HOA membership, ensure that all legal and ethical standards are followed, and that the HOA is appropriately managing our assets and resources.
- b. **Policy:** maintaining, developing and implementing sound policies for the HOA to operate.
- c. **Strategic guidance:** provide on-going planning, developing and monitoring of the HOA's short and long-term plans, goals and objectives.
- d. **Oversight of management:** develop measurable objectives and ensure the HOA's General Manager is deliberate and effective in his or her responsibilities, expectations and duties.

**3. Have you ever served as a member of a Board of Directors? Where, when, and for what organizations?**

- a. **Rocky Mountain Health Management Corporation**, Grand Junction, Colorado, 2007-2017. This entity provided the workforce, management and operating services to a regional health plan that operated in the State of Colorado.
- b. **Hilltop Community Resources**, Grand Junction, Colorado, 2006-2010. This organization provided a broad range of services for youth, family, adults and seniors, including but not limited to: senior housing (independent, assisted, memory, and long-term care), a brain injury recovery campus, job skill training, transitional living programs, pre and post-natal healthcare coordination and education for teen and young adult mothers, battered women refuge and housing, food assistance and family counseling.
- c. **Pease Oil and Gas Company**, Grand Junction, Colorado, 1997-2002. This was a regional, fully integrated, oil and gas company operating in Colorado, Utah, Texas and Louisiana.

Although not governing bodies per se, the following are relevant to serving on the HOA Board:

- a. **Colorado Mesa University Investment Advisory Council**, Grand Junction, Colorado, 2009 to present. Although this is not a governing body, this is a working committee for the University's Board of Trustees that is tasked with: i) developing, maintaining and modifying from time-to-time the University's Investment Policy; ii) provide oversight and advise the Trustees on the portfolio's performance and risk profile; and iii) review the performance of the third party Investment Managers on a quarterly basis.
- b. **Colorado Mesa University Presidential Advisory Council**, Grand Junction, Colorado, 2010-2018. Although this also is not a governing body, this is a working committee of select community leaders for the University's President and Board of Trustees tasked with assisting the University in its short and long-term planning.

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

I believe my professional and life experiences have developed a good skill set to serve our Board and our Community. I'm analytical, financially literate, personable, have a knack for solving problems and getting the job done. I'm a "hands-on" guy and am not afraid to roll up my sleeves. My professional experience includes strategic planning, financial forecasting/modeling, financial statement preparation and interpretation, budgeting, investment portfolio management and oversight, and risk management. I'm collaborative, open to new ideas, teachable, diplomatic, and tactful. I believe it's important to build strong and effective working relationships with staff, peers, management, directors, and outside business partners. I enjoy an active lifestyle and appreciate all the opportunities and services our community provides for one to live well. I have a vested interest in having our community thrive.

**5. What is your professional and educational background?**

I received a Bachelor of Science in Accounting from the University of Wyoming, have been a Certified Public Accountant, or CPA, since 1986 (now retired) and was a Chief Financial Officer for two organizations spanning a period of 26 years.

**6. What association amenities do you use?**

Both golf courses, driving range, chipping and putting practice areas at both locations, pickleball courts, billiards room, restaurant/bar at both locations, health club facility, events held in the ballroom, and the walking trails around the lakes. I am planning to try my hand at short court tennis in the near future.

**7. List any Association committees on which you have served.**

Audit and Finance Committee - 2021 to present

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

Two

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

Born and raised in Casper, Wyoming, I grew up enjoying the great outdoors. I am the youngest of three. Married to Jeanne. Three children, grown now, all in their 30's. Over the course of my career, I have been a laborer, a welder, a surveyor, a banker, a consultant, an accountant, an investor and an executive. Among other things, I am a father, a friend, and a husband. I've been a hunter, an archer, a motorcyclist, a golfer, an outdoorsman, a wakeboarder, a skier and an avid fisherman. I'm environmentally conscious and Lake Powell is my favorite place on earth.