



**CITY AND COUNTY OF DENVER**  
PRIVILEGED AND CONFIDENTIAL WORK PRODUCT

Michael B. Hancock  
Mayor

To: Mayor Michael B. Hancock  
From: Romaine Pacheco, Director  
Date: March 23, 2023

**BOARD:** Metro Water Recovery Board of Directors

POC: Ruth Kedzior

**BACKGROUND:**

Members: 10

Terms: 2 Years

Confirmation: Yes

Members must be individuals who are eligible to vote in general elections and who reside within the district and city from which they are appointed or reappointed.

**RECOMMENDATIONS:**

Travis Bogan, Denver (M)(C) for a term expiring June 30, 2025, appointed;

Thomas Roode, Denver (M)(C) for a term expiring June 30, 2025, appointed;

Mary Gearhart, Denver (F)(C) for a term expiring June 30, 2025, reappointed;

Doug Lazure, Denver (M)(C) for a term expiring June 30, 2025, reappointed;

Jennifer Williams, Denver (M)(C) for a term expiring June 30, 2025, reappointed;

Peter Spanberger, Denver (M)(C) for a term expiring June 30, 2025, reappointed;

Andrew Johnston, Denver (M)(C) for a term expiring June 30, 2025, reappointed;

**ACTION NEEDED:**

☒ Appoint Bogan and Roode

☒ Reappoint Spanberger, Johnson, Gearhart, Lazure, and Williams

☐ Please provide additional candidates to consider.



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**BAC-8706**

### Contact Information

Contact Name	Thomas Roode	Home Address	3050 S. Forest St.
Preferred Phone	3035705581	Home City	Denver
Preferred Email	tom.roode1@gmail.com	Home State	CO
Other Phone	3036287033	Home Zip	80222
Other Email	tom.roode@denverwater.org	County	Denver
DOB	[REDACTED]	Hispanic or Latino origin or Descent?	No
SSN	[REDACTED]	Race/Ethnicity	Caucasian
Gender	Male	Other Ethnicity	
Other Gender		Salutation	Mr.

## Board Information

<b>Board Name</b>	Metro Water Recovery	Other boards or commissions served
<b>Status</b>	New	Resigned
<b>Term Start Date</b>		
<b>Term End Date</b>		

## Work Information

Employer	Denver Water	Work Address	1600 West 12th Ave
Position	Chief Operations and Maintenance Officer	Work City	Denver
Business Phone #	3036286000	Work State	CO
Work Email	tom.roode@denverwater.org	Work Zip	80204

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	4		

### Education and General Qualifications

<b>Name of High School</b>	<b>Thompson Valley HS</b>	<b>Name of Graduate School</b>	<b>University of Colorado - Denver</b>
<b>Location of High School</b>	<b>Loveland, CO</b>	<b>Location of Graduate School</b>	<b>Denver, CO</b>
<b># of Years Attended High school</b>	<b>4</b>	<b># of Years Attended Graduate School</b>	<b>3</b>

Did you Graduate High School	Yes
---------------------------------	-----

**Did you Graduate**      **Yes**

**Graduate Major**      **MBA**

<b>Name of College</b>	<b>Colorado State University</b>
<b>Location of College</b>	<b>Fort Collins, CO</b>
<b># of Years Attended College</b>	<b>5</b>
<b>Did you Graduate College</b>	<b>Yes</b>
<b>Undergrad Major</b>	<b>Mechanical Engineering</b>

### Reference Details

**Reference Name #1** Jim Lochhead  
**Reference Phone #1** 3035149424

Reference Email #1 jim.lochhead@denverwater.org

Reference Address #1 1600 West 12th Ave, Denver, CO 80204

**Reference Name #2**      **Julia Anderson**  
**Reference Phone #2**      **7202311103**

Reference Email #2 julle.anderson@denverwater.org  
Reference Address #2 1600 West 12th Ave, Denver, CO 80204

**Reference Name #3** Jessica Brody  
**Reference Phone #3** 3035255125

Reference Email #3 jessica.brody@denverwater.org

Reference Address #3 1800 West 12th Ave, Denver, CO 80204

**Agree to a background check** ✓

**Owner** Romaine Pacheco

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**Last Modified By** Denver Integration, 2/16/2023 11:32 AM

### Notes & Attachments

## Tom Roode Bio.docx

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### Last Modified Denver Integration

### Description

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Tom Roode

Denver Water Chief of Operations and Maintenance – reporting directly to the CEO

[Tom.roode@denverwater.org](mailto:Tom.roode@denverwater.org), (303) 570-5581



- Joined Denver Water in 2009 as assistant chief of Engineering.
- Named chief of Operations and Maintenance in 2011.
- Has 27 years of experience in the municipal water and wastewater industries in roles as utility owner, consultant and construction contractor.
- Received a bachelor's degree in mechanical engineering from Colorado State University.
- Received a master's degree in business administration from the University of Colorado at Denver.
- Is a registered professional engineer in the state of Colorado.

Operations and Maintenance at Denver Water is responsible for operating and maintaining the physical and natural assets used to deliver water to Denver Water customers. These assets include rivers, canals, reservoirs, dams, tunnels, pipelines, valves, hydropower, tanks, pump stations and treatment plants. Operations and Maintenance establishes and implements criteria for the proper operation of all assets to the satisfaction of outside regulating agencies and Denver Water customers. It is composed of six sections: Source of Supply, Water Quality and Treatment, Water Distribution, Support Services, Business Operations, and Customer Service Field. Support Services provides fleet services, warehouse and trade shop functions, including mechanical, electrical, plumbing, welding, carpentry and grounds maintenance to Denver Water.



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## BAC-8748

### Contact Information

Contact Name	Travis Bogan	Home Address	2630 Meade Street
Preferred Phone	720-201-3415	Home City	Denver
Preferred Email	travis.bogan@denvergov.org	Home State	CO
Other Phone	720-913-8815	Home Zip	80211
Other Email		County	Denver
DOB		Hispanic or Latino origin or Descent?	No
SSN		Race/Ethnicity	Caucasian
Gender	Male	Other Ethnicity	
Other Gender		Salutation	

### Board Information

Board Name	Metro Water Recovery	Other boards or commissions served	
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	Denver Department of Transportation and Infrastructure	Work Address	201 W. Colfax
Position	Director of Special Projects and Initiatives	Work City	Denver
Business Phone #	720-913-8815	Work State	CO
Work Email	travis.bogan@denvergov.org	Work Zip	80202

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	1		

### Education and General Qualifications

Name of High School	Nicolet High School	Name of Graduate School	University of Minnesota
Location of High School	Glendale, WI	Location of Graduate School	Minneapolis, MN
# of Years Attended High school	4	# of Years Attended Graduate School	2

Did you Graduate High School	Yes	Did you Graduate	Yes
Name of College	University of Minnesota	Graduate Major	Master of Science In Civil Engineering
Location of College	Minneapolis, MN		
# of Years Attended College	5		
Did you Graduate College	Yes		
Undergrad Major	Bachelor of Civil Engineering		

Reference Details

Reference Name #1	Adam Phipps	Reference Email #1	adam.phipps@denvergov.org
Reference Phone #1	720-865-3044	Reference Address #1	201 W. Colfax, Denver, CO 80202
Reference Name #2	Margaret Medellin	Reference Email #2	margaret.medellin@denvergov.org
Reference Phone #2	720-865-8725	Reference Address #2	201 W. Colfax, Denver, CO 80202
Reference Name #3	Liam Cavanaugh	Reference Email #3	liam.cavanaugh@mwr.dst.co.us
Reference Phone #3	303-286-3000	Reference Address #3	6450 York St, Denver, CO 80229
Agree to a background check	<input checked="" type="checkbox"/>		
Owner	Romaine Pacheco	Created By	Denver Integration, 3/7/2023 6:44 AM
		Last Modified By	Denver Integration, 3/7/2023 6:44 AM

Notes & Attachments

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# Travis Bogan, P.E., PMP

travis.bogan@denvergov.org • 2630 Meade St. Denver, CO 80211 • 720.201.3415

## Objective & Core Strengths

Leverage experience gained from a successful career managing the delivery of large, multi-disciplinary vertical and horizontal public infrastructure projects, and recent experience collaborating with City leaders in the reauthorization of Denver's small, minority, and women business enterprise contracting ordinance, to help enhance the quality of life in Denver by efficiently delivering effective, high quality, safe and equitable public infrastructure.

Planning & Evaluations | Procurements & Contracting | Risk Management | Scheduling | Cost Estimating  
Communication | Teambuilding | Consensus Building | Negotiating | Conflict Resolution

## Professional Experience

### Department of Transportation and Infrastructure | Denver

#### Director of Special Projects and Initiatives, 8/2020-Present

- Lead the Special Projects and Initiatives Division in delivering over \$1B in transformational projects including: the Colorado Convention Center Expansion Project, the 16th St Mall Reconstruction Project, the Colfax BRT Project, and the Waterway Resiliency Program (formerly Urban Waterways).

#### DOTI CEI Program Manager, 1/2020 – 8/2020

- Helped charter and direct a team of subject matter experts and DOTI leaders to align DSBO Ordinance and Rules and Regulation with DOTI policies, procedure, and practices. The team is on-track to achieve the seven goals and 20 objectives defined in the program charter.
- Developed and fostered positive relationships with other City Department leaders; helped citywide workgroups achieve consensus on DSBO program-related elements of City governance that will impact DOTI operations.

#### BI-OM Engineer-Architect Supervisor, 2/2019-1/2020

- Supervised eight project managers and one project inspector; provided oversight and guidance on project planning and delivery from design through construction; reviewed and approved professional services and construction contracts, task orders, work orders, and invoices/pay applications; mentored, coached, and developed staff; and facilitated portfolio review meetings with stakeholders and City leaders.
- Helped manage and coach the larger BI-OM team of over 30 professionals in the delivery of \$100M+ in design and construction projects, maintaining an average SPI >0.9, while contributing to a number of successful initiatives, including: vertical construction on-call procedure, SBE utilization framework, standardized forms and TO/WO workbook tools, and the FIPM Project Management Training program.

### Stantec | Denver

#### Business Center Sector Leader/Principal Engineer, 7/2014-1/2019

As Business Center Sector Lead (BCSL), Travis was responsible for a \$6M-\$8M/year professional services business within Stantec delivering large, complex, multi-disciplinary design and construction projects, with a focus on:

• • •

- Leading a multi-disciplinary team of ~25 engineers, architects, and specialists in the pursuit and successful delivery of regional public infrastructure projects.
- Developing scopes, budgets, schedules, workplans, and developing and managing many different types of contracts including: professional service agreements, equipment procurement contracts, hard bid construction contracts, progressive D/B contracts, CM/GC services and construction contracts.

As Principal Engineer, Travis was engineer of record and responsible for the delivery of higher complexity/higher risk projects. Select examples include:

- The Metro Wastewater Reclamation District's 2018 Facility Plan is a 20-yr District-wide plan for, the Transmission System, the Robert W. Hite Treatment Facility, the Northern Treatment Plant, the METROGRO Farm/Biosolids Facilities, and overall support facilities.

The work consisted of leading a team of technical experts and District stakeholders in the integration of various initiatives, projects, and studies; development of planning criteria; development, analysis, and selection of process and facility alternatives; and development of capital expenditure schedule budget and timing recommendations for ~\$2B in horizontal and vertical regional public infrastructure.

- The Metro Wastewater Reclamation District Nuisance Struvite and Dewaterability Improvements Project was a multi-year, multi-phase project resulting in construction of a ~\$24M phosphorus recovery facility at the Robert W. Hite Treatment Facility, improving effluent quality and reducing O&M effort in the solids process by efficiently capturing phosphorus for beneficial reuse.

The project included pilot experiments and modeling, life-cycle cost evaluations, and development and implementation of creative work packaging and contracting strategies to meet an aggressive schedule.

#### CDM Smith | Denver

Client Service Manager/Principal Engineer, 12/2003-6/2014

As Client Service Manager, Travis managed a \$2M-\$4M/year business within CDM Smith, with similar responsibilities as described with Stantec. As Principal Engineer, Travis was engineer of record and delivered a wide variety large and complex multi-disciplinary projects, with some select examples summarized below:

- Colorado Springs Utilities Southern Delivery System Raw Water Pump Stations was a progressive design/build converted to hard bid @ 60% design completion. The project included a best value lifecycle equipment selection (~\$12M), and hard bid construction of three pumping stations (~\$76M).
- Metro Wastewater Reclamation District's North Bar Screen and Grit Improvements was a progressive design/build project resulting in ~\$25M in preliminary treatment improvements at the Robert W. Hite Treatment Facility.
- Metro Wastewater Reclamation District's Sand Creek Bank Stabilization Project was a ~\$5M alternative delivery project for disaster recovery work associated with Sand Creek bank failure along the east side of the District's Robert W. Hite Treatment Facility near the confluence with the South Plate River.

#### Education

University of Minnesota, Twin Cities; Institute of Technology, Minneapolis, MN

2003 Master of Science in Civil Engineering

2001 Bachelor of Civil Engineering





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## BAC-8695

### Contact Information

Contact Name	Jennifer Williams	Home Address	1202 S Clarkson St
Preferred Phone	615-497-0002	Home City	Denver
Preferred Email	jennifer.williams@denvergov.org	Home State	CO
Other Phone		Home Zip	80210
Other Email		County	Denver
DOB		Hispanic or Latino origin or Descent?	No
SSN		Race/Ethnicity	Caucasian
Gender	Female	Other Ethnicity	
Other Gender		Salutation	Ms.

### Board Information

Board Name	Metro Water Recovery	Other boards or commissions served	
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	City and County of Denver	Work Address	2000 W 3rd Ave
Position	Principal Project Manager	Work City	Denver
Business Phone #	303-446-3549	Work State	CO
Work Email	jennifer.williams@denvergov.org	Work Zip	80223

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	7		

### Education and General Qualifications

Name of High School	George Jenkins High School	Name of Graduate School	Vanderbilt University
Location of High School	Lakeland, Fl	Location of Graduate School	Nashville, Tn
# of Years Attended High school	4	# of Years Attended Graduate School	2

Did you Graduate  
High School

Yes

Did you Graduate

Yes

Graduate Major

Environmental Engineering

Name of College

University of Florida

Location of College

Gainesville, Florida

# of Years Attended  
College

4

Did you Graduate  
College

Yes

Undergrad Major

Ag &amp; Bio Engineering

### Reference Details

Reference Name #1

Andrew Johnston

Reference Email #1

andrew.johnston@denvergov.org

Reference Phone #1

303-335-6338

Reference Address #1

201 W Colfax Ave, Denver, Co 80202

Reference Name #2

Bruce Uhemik

Reference Email #2

bruce.uhemik@denvergov.org

Reference Phone #2

303-808-6740

Reference Address #2

2000 W 3rd Ave, Denver Co 80223

Reference Name #3

Charles Hart

Reference Email #3

charles.hart@denvergov.org

Reference Phone #3

303-446-3642

Reference Address #3

2000 W 3rd Ave, Denver Co 80223

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Owner

Romaine Pacheco

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### Notes & Attachments

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## SPECIALTY KNOWLEDGE, SKILLS, AND EXPERIENCE

Environmental Engineering  
Water Resources  
Strategic Master Planning  
Budget Management  
Program Coordination  
Oral & Written Communication  
Community Outreach  
Congressional Lobbying  
Supervision and Mentoring  
Data Driven Metrics, Process  
Improvement, and Innovation

## EDUCATION

B.S., 2003, Ag & Bio  
Engineering, University of  
Florida, GPA 3.7/4.0

M.S., 2006, Environmental  
Engineering, Vanderbilt  
University, GPA 3.9/4.0

## PROFESSIONAL LICENSURE

State of Colorado- Professional  
Engineer (PE-49747)

Certified Floodplain Manager

## SPECIALTY TRAINING

City and County of Denver, Peak  
Academy, Green and Black Belts  
Silicon Flatirons, Governmental  
Entrepreneurial Leadership  
Accelerator Graduate

## PROFESSIONAL HISTORY

Principal Project Manager,  
City and County of Denver  
July 2022 - current

Planning Supervisor,  
City and County of Denver  
March 2021 - July 2022

Engineer & Senior Engineer,  
City and County of Denver  
December 2014 - March 2021

Engineer, CDM Smith Nashville  
August 2006 - July 2011

In my career, I have cultivated a love for the City and County of Denver. Continuing my role as a Director on the Metro Water Recovery (MWR) Board of Directors, I will continue to leverage my experience and passion to improve infrastructure for the residents of Denver.

### Director, Metro Water Recovery Board of Directors

- Currently serving as Chair of the Operations Committee, responsible for leading the monthly meetings.
- Participant on the Strategic Committee, responsible for developing the updated MWR strategic plan.
- Participant on the Executive Committee, growing my leadership responsibilities on the Board of Directors.

### Principal Project Manager, City and County of Denver

- Integral team member who developed content, lobbied, and built relationships that contributed to the receipt of a \$350M federal grant for the South Platte River and Tributaries Project.

### Planning Supervisor, City and County of Denver

- Led staff and collaborating in the Wastewater Infrastructure Project Management leadership team, advocating investment in the team to build relationships and grow the careers of existing staff, including hiring of 4 new staff members.
- Contributed to the development of the \$350M Six-Year Water Plan, which included creation of materials, messaging, and strategic target alignment.

### Senior Engineer and Engineer, City and County of Denver

- Managed the South Platte River and Tributaries Project, including Congressional lobbying, intensive Council and public outreach for a \$500M, 6.5-mile investment in the South Platte River.
- Served as liaison with U.S. Army Corps of Engineers (USACE), The Greenway Foundation, and Mile High Flood District (MHFD).
- Managed citywide \$800K 2021 Sanitary Sewer Master Plan.
- Championed Project Partnership Agreements, Grant Agreements, and Intergovernmental Agreements (IGA) with MWRD, USACE, State of Colorado, and MHFD.
- Managed the USACE Section 1135 Southern Platte Valley Environmental Assessment and Design, which will invest \$12M along 2.5 miles of the South Platte River
- Managed Denver's responses for Major Drainageway Plans (MDPs) and Outfall Systems Plans (OSPs)
- Served as sanitary sewer subject matter expert on Denver's One Water Plan and Blueprint Denver.
- Supporting the DOTI culture by applying the four key principles and STARS Goals in all aspects of work.

### Engineer, CDM Smith, Nashville, Tennessee

- Developed and wrote Corrective Action Plan/Engineering Reports (CAP/ERs) for municipalities in Tennessee.
- Lead modeler for Nashville's Whites Creek Basin.
-

**Jennifer L. Williams, PE, CFM**

1202 S Clarkson St, Denver, Colorado 80210  
615-497-0002 [Jennifer.Williams@denvergov.org](mailto:Jennifer.Williams@denvergov.org)

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## BAC-8664

### Contact Information

Contact Name	Mary Gearhart	Home Address	3333 E. Florida Ave, #75
Preferred Phone	3036215792	Home City	Denver
Preferred Email	mary.gearhart@denvergov.org	Home State	CO
Other Phone		Home Zip	80210
Other Email	gearhartm1@msn.com	County	Denver
DOB	[REDACTED]	Hispanic or Latino origin or Descent?	No
SSN	[REDACTED]	Race/Ethnicity	Caucasian
Gender	Female	Other Ethnicity	
Other Gender		Salutation	Ms.

### Board Information

Board Name	Metro Water Recovery	Other boards or commissions served	Metro Wastewater Reclamation District
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	City and County of Denver	Work Address	201 W. Colfax Ave, suite 600
Position	Principal Project Manager	Work City	Denver
Business Phone #	720-913-1311	Work State	CO
Work Email	mary.gearhart@denvergov.org	Work Zip	80202

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	6		

### Education and General Qualifications

Name of High School	South High School	Name of Graduate School	
Location of High School	Denver	Location of Graduate School	
# of Years Attended High school	3	# of Years Attended Graduate School	

Did you Graduate  
High School

Yes

Did you Graduate

Graduate Major

Name of College University of Colorado at Denver

Location of College Denver, CO

# of Years Attended  
College 4

Did you Graduate  
College

Yes

Undergrad Major BS in civil engineering

### Reference Details

Reference Name #1 Margaret Medellin

Reference Email #1 margaret.medellin@denvergov.org

Reference Phone #1 720-913-1311

Reference Address #1 201 W. Colfax Ave, suite 600, Denver, CO 80202

Reference Name #2 David Julia

Reference Email #2 david.julia@denvergov.org

Reference Phone #2 720-913-1311

Reference Address #2 201 W. Colfax, suite 600, Denver, CO 80202

Reference Name #3 Stephanie Foote

Reference Email #3 stephanieafoote@gmail.com

Reference Phone #3 303-941-9515

Reference Address #3 3333 e. Florida ave, #77, Denver, CO 80210

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Owner Romaine Pacheco

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Mary J. Gearhart, is a senior executive with more 45 years of experience leading projects, people and programs to enhance the built environment. With experience in technical aspects of environmental engineering including design, construction and operation of systems, to management of complex projects, she has achieved a reputation for problem-solving, customer service, risk management and mentoring. She brings nearly 30 years of private sector engineering business experience and nearly 10 years of government sector experience, developing permitting programs, regulatory programs, and implementation of compliance programs in the environmental programs.

Currently, Mary is the Senior Manager of Policy and Strategy for the Utilities Administration of the City and County of Denver. In this newly-created position, she is responsible for analyzing the wastewater, solid waste and stormwater programs and developing policies, processes and procedures to achieve accreditation through the American Public Works Association, and improving the efficiency of the programs in the administration. She was recently appointed by the Mayor to the board of Metro Water Recovery to represent the City's interests in the regional wastewater treatment plants which serve nearly 2.2 million people in Colorado's Front Range.

Mary was Permitting Manager for the City of Greeley's Milton Seaman Water Supply Project, which was a complex dam and reservoir expansion plan to provide storage for the City through 2075. She worked closely with the City staff and the US Army Corps of Engineers (the permitting authority), along with approximately 20 other city, state, local and federal agencies to develop permitting documents to support a decision by the USACOE. She identified and managed mitigation plans for multiple regulatory risks and managed a team of staff and consultants. Ultimately, the City determined that the costs would be prohibitive for the residents and looked for and found an alternative project.

As a Senior Vice President with Brown and Caldwell, she was an operations manager of an office, a large region, and a client service program, and stood up a project management office (PMO) for this 1400-person privately-held firm. The firm's loss of potential profit prior to her program design and implementation was between 2 and 3 percent annually. After implementation of the PMO, the loss was substantially reduced to less than 0.5 percent. In this program, she developed risk management teams, project review teams, worked with the IT team to make the internal PM system more robust, and trained over 400 project managers on the system.

She is currently a University of Colorado Foundation trustee, working with the Gates Institute for CU Anschutz, as well as supporting the CU Denver College of Engineering financially and through its various engineering support committees. She is also an executive Committee member of the Colorado FFA Foundation.

She was named a Woman of Distinction by the Girl Scouts of Colorado and has served on multiple boards and commission throughout her career, including the Colorado Water Quality Control Commission, the Sand Creek Foundation, and is a board member for the Osborn and Caywood Ditch, and the Stumpf Lateral Ditch companies, representing the FFA's interests in the oldest water rights on the Little Thompson River in Larimer County.

Mary received her Bachelor's of Science in Civil Engineering from the University of Colorado at Denver and is a license professional engineer in Colorado.



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## BAC-8673

### Contact Information

Contact Name	Peter Spanberger	Home Address	1633 Monroe St
Preferred Phone	303-246-9560	Home City	Denver
Preferred Email	peter.spanberger@denvergov.org	Home State	CO
Other Phone		Home Zip	80206
Other Email		County	Denver
DOB	[REDACTED]	Hispanic or Latino origin or Descent?	No
SSN	[REDACTED]	Race/Ethnicity	Caucasian
Gender	Male	Other Ethnicity	
Other Gender		Salutation	Mr.

### Board Information

Board Name	Metro Water Recovery	Other boards or commissions served	
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	City and County of Denver	Work Address	2000 W 3rd Ave
Position	Financial Director	Work City	Denver
Business Phone #	303-446-3447	Work State	CO
Work Email		Work Zip	80223

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	10		

### Education and General Qualifications

Name of High School	Littleton High School	Name of Graduate School	University of Denver
Location of High School	Littleton, CO	Location of Graduate School	Denver, CO
# of Years Attended High school	4	# of Years Attended Graduate School	2



Did you Graduate High School Yes

Name of College University of Colorado

Location of College Boulder, CO

# of Years Attended College 4

Did you Graduate College Yes

Undergrad Major Finance

Did you Graduate Yes

Graduate Major MBA Accounting

Reference Details

Reference Name #1 Zach Cartaya

Reference Phone #1 720-913-1775

Reference Email #1 zachary.cartaya@denvergov.org

Reference Address #1 201 W Colfax Ave, Denver, CO

Reference Name #2 Doug Lazure

Reference Phone #2 303-446-3472

Reference Email #2 doug.lazure@denvergov.org

Reference Address #2 2000 W 3rd Ave, Denver, CO

Reference Name #3 Earl Jackson

Reference Phone #3 720-865-8707

Reference Email #3 earl.jackson@denvergov.org

Reference Address #3 201 W Colfax Ave, Denver, CO

Agree to a background check ✓

Owner Romaine Pacheco

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Notes & Attachments

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**EXPERIENCE****City and County of Denver****2012 - Present*****Financial Director – Department of Transportation and Infrastructure*****2019- Present**

- Led a team of 25 employees to oversee the financial operations of one of the City's largest, most complex departments. DOTI has a multibillion-dollar capital program, various revenue streams totaling over \$400M per year, and an annual operating budget of \$300M.
- Provided strategic direction and oversight of department finances, including budgeting, forecasting, accounting, external financial reporting, and the implementation of new fee-based solid waste and sidewalk funds.
- Recommended changes in fee structures to generate an additional \$20M in annual revenue, ensuring the long-term fiscal health of the department while also improving equity among ratepayers.
- Fostered a culture of continuous improvement. Examples include revamping the asphalt plant's ticketing process to yield \$1M in soft cost savings and utilizing new software to automate manual tasks to save \$500K/year.
- Strengthened control activities by implementing new analytical procedures, monthly workpaper reviews, performance metrics & KPIs, and written policies & procedures over high-risk financial processes.
- Implemented an internal audit function to provide a risk-based approach to help DOTI achieve its operating, reporting, and compliance objectives.

***Financial Manager – Department of Transportation and Infrastructure, Wastewater Enterprise*****2015 - 2019**

- Led a staff of 10 employees to oversee the financial operations of the fund, including budgeting, accounting, forecasting, and financial reporting.
- Issued over of \$200M of revenue bonds while maintaining AAA ratings with bond rating agencies.
- Created a long-term cash flow model to ensure the fund's fiscal health, inform rate increases, and ensure compliance with bond covenants.

***Fiscal Administrator – Department of Finance*****2012 - 2015**

- Created a framework to evaluate and monitor internal controls. Worked with various City departments to document their financial processes and recommend improvements.
- Assisted in the issuance of the City's Annual Comprehensive Financial Report. Worked closely with external auditors and researched relevant accounting standards to ensure compliance with GAAP.

**Grant Thornton****2008 – 2010*****Senior Financial Auditor***

- Led financial and internal control audits for clients in the manufacturing, restaurant, and real estate industries.
- Developed comprehensive audit strategies, oversaw efficient audit execution, and managed client expectations and communications.

**McCluer Corporation****2001 – 2007*****Management Consultant***

- Led end-to-end process improvement consulting engagements to improve the operating efficiency and effectiveness of major metropolitan newspapers such as *The Atlanta Journal-Constitution* and *Chicago Tribune*.
- Achieved annual cost savings ranging from \$2M to \$5M for clients. Presented findings and recommendations to executive management.

**EDUCATION****University of Denver****2005 - 2006**

- Master of Business Administration with emphasis in Accounting. Graduated with honors.

**University of Colorado at Boulder****1996 - 2000**

- Bachelor of Science in Finance. Graduated with honors.

**ADDITIONAL**

- Board member for Metro Water Recovery since 2017. Currently serving as Vice President of Audit Committee and member of Finance Committee. Advised Metro's senior leadership on multi-year strategic and financial planning.



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## BAC-8680

### Contact Information

Contact Name	Doug Lazure	Home Address	3923 S. Newport Way
Preferred Phone	7202897251	Home City	Denver
Preferred Email	doug.lazure@denvergov.org	Home State	CO
Other Phone		Home Zip	80237
Other Email	doug.lazure@denvergov.org	County	Denver
DOB	[REDACTED]	Hispanic or Latino origin or Descent?	No
SSN	[REDACTED]	Race/Ethnicity	Caucasian
Gender	Male	Other Ethnicity	
Other Gender		Salutation	

### Board Information

Board Name	Metro Wastewater Reclamation District	Other boards or commissions served	Metro Wastewater Reclamation District
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	City and County of Denver	Work Address	3923 S. Newport Way
Position	Finance Manager	Work City	Denver
Business Phone #	13034463472	Work State	CO
Work Email	doug.lazure@denvergov.org	Work Zip	80237

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	3		

### Education and General Qualifications

Name of High School	Creighton Preparatory	Name of Graduate School	University of Colorado at Denver
Location of High School	Omaha, NE	Location of Graduate School	Denver, CO
# of Years Attended High school	4	# of Years Attended Graduate School	4

Did you Graduate  
High School

Yes

Did you Graduate

Yes

Graduate Major

MBA

Name of College

Creighton University

Location of College

Omaha, NE

# of Years Attended  
College

4

Did you Graduate  
College

Yes

Undergrad Major

Finance; Accounting

### Reference Details

Reference Name #1

Patrick Kneeland

Reference Email #1

patrick.kneeland@gmail.com

Reference Phone #1

7205304985

Reference Address #1

2990 Forest Dr., Denver, CO 80222

Reference Name #2

Kevin Taylor

Reference Email #2

kevin.taylor@investnet.com

Reference Phone #2

505-2803005

Reference Address #2

720 E Redwood Court, Littleton, CO 80126

Reference Name #3

Matt Conger

Reference Email #3

matthew.c.conger@xcelenergy.com

Reference Phone #3

3035527262

Reference Address #3

4453 Yates St., Denver, CO 80212

Agree to a  
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✓

Owner

Romaine Pacheco

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### Notes & Attachments

Doug\_Lazure Resume.docx

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Description

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# Doug Lazure, CPA, MBA

3923 S. Newport Way • Denver, CO 80237 • 720.289.7251 • Doug.Lazure@gmail.com

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## EDUCATION AND ACCREDITATIONS

**Certified Public Accountant (CPA)**

**MBA with Emphasis in Business Strategy**

University of Colorado at Denver

**B.S.B.A., Double Major in Accounting and Finance**

Creighton University, Omaha, NE. Graduated in 2004

**Successfully Completed Wharton School at University of Pennsylvania's College of Business *The CFO: Becoming a Strategic Partner* Leadership Program**

## PROFESSIONAL EXPERIENCE

**CITY AND COUNTY OF DENVER; Denver, CO – Department of Transportation and Infrastructure**

**Finance Manager – Revenue, Capital Assets, and Financial Reporting**

**January 2020 – Present**

- Manage and ensure the financial health of both the Wastewater Enterprise Fund and the City's General Fund, including capital and operating activities
- Manage all revenue streams, capital assets, and financial reporting for the City's largest agency, overseeing \$1B in assets
- Report directly to the Executive Leadership team to communicate monthly, quarterly, and annual financial results
- Appointed by the Mayor of Denver to the Board of Metro Water Recovery

**SOUTHWEST GENERATION OPERATING COMPANY, LLC**

**Controller**

**March 2019 – February 2020**

- Manage the month-end close process and financial reporting for a privately held and financed energy company overseeing \$1.8B in assets comprised of 8 gas turbine facilities
- Implement process improvements to improve cash flow, reduce month-end close processes, and implement a strong control environment
- Develop policies and business infrastructure for a rapidly growing company, finance function, and accounting department

**COLORADO STATE UNIVERSITY – GLOBAL CAMPUS; Denver, CO**

**Controller**

**July 2017 – March 2019**

- Responsible for the management of over \$100 million in assets of the University
- Leader of the Accounting and Finance function of the University, including the management of five accounting and finance professionals
- Oversee the development and implementation of finance and accounting policies to ensure the financial well-being and integrity of the organization
- Strategic Partner of the Organization's Leadership team to shape the University's Vision and Strategic Initiatives

**XCEL ENERGY; Denver, CO**

**Manager – Xcel Energy Regulatory**

**AUGUST 2009 – JULY 2017**

**April 2015 – July 2017**

- Responsible for accurately and timely completion of the month-end close process for the Xcel Regulatory team, focusing on Xcel's Electric business. Assume lead role for presenting month-end financial reporting and analysis to CFO leadership in a clear, concise manner while addressing any questions or concerns from all levels of management
- Assumes managerial duties for the review and approval of journal entries, energy regulatory forms, and account reconciliations for the Xcel Regulatory Gas Analyst and Joint Venture Senior Analyst.
- Led the Regulatory Accounting and Finance True-up Project to break down silos to improve accounting and financial reporting. Coordinating with Regulatory Accounting and Finance, Revenue Requirements, and Rates teams to align efforts to identify process improvements and accuracy in setting customer rates.

**Utility Finance *Productivity Through Technology (PTT)* Lead Change Agent**

**November 2014 – July 2017**

- Ensure successful completion of the General Ledger phase of the PTT Project and SAP implementation for Utility Accounting and Finance through collaboration with multiple departments and individuals both within and outside of Utility Accounting and Finance. All of these efforts helped with the success of the implementation as evidenced by the completion of all financial reporting deadlines for each month-end close, low volumes of calls to the Super User hotline, and a high level of employee morale as evidenced by PTT Change Tracking Surveys.
- Led PTT Utility Accounting Change Agents to successfully transition Utility Accounting and Finance departments to the new SAP environment and coordinate PTT deliverables for all Utility Accounting and Finance departments. This includes, but is not limited to: Timely completion of all deliverables for Utility Accounting and Finance departments, Communicated the

timeline of project deadlines and status updates to Senior Management, Ensured all Utility Accounting and Finance employees have appropriate business roles and access to the SAP system, Coordinated with Utility Accounting and Finance Managers and Directors to ensure all business processes are documented in preparation for the General Ledger Conversion, and lead a smooth transition from JD Edwards to SAP.

- Assumed a lead role as Subject Matter Expert for both the Xcel Commercial Accounting and Xcel Regulatory Accounting and Finance teams to facilitate successful implementation of the SAP system. Worked closely with team members to help solve and improve their experiences with a new General Ledger system. This voluntary role involved answering questions, training new employees, and helping employees bridge the gap from J.D. Edwards to SAP.

**Senior Financial/Accounting Analyst – Commercial Accounting**

**September 2013 – April 2015**

- Accurately completed the month-end close process, financial reporting, and resolve complex, abstract business issues
- Improved processes, reporting, and developed new analytics to streamline the month-end close process, ensured accurate financial reporting, and fulfilled business area and rate case requests in an accurate and timely manner

**Senior Financial Analyst – Retail & Customer Accounting and Finance**

**August 2009 – September 2013**

- Accurately and timely completed the month-end close process, financial reporting, and resolve complex business issues
- Nominated and selected to participate in the CFO'S Wheel Rotational Program. Demonstrated learning agility by cross-training across multiple departments while developing other Wheel program participants in Accounting and Finance job responsibilities
- Automated the Non-Commodity Billing process by restructuring the billing process. This included: research of multiple accounting information systems to identify the capabilities and deficiencies of each system, collaborated with IT to ensure a successful implementation, and performed due diligence with the appropriate amount of testing prior to go-live
- Managed the Non-Commodity Billing process for Retail and Customer Accounting and Finance. This includes, but is not limited to, the review of complex contracts with third parties, ensured all Transmission project costs are accurate and reimbursable in accordance with contract terms, completion of the invoice process in the CRS billing system, ensured accurate financial reporting to management, and managed the accounting for these projects from beginning to end

**PEPSICO; Chicago, IL**

**Customer Financial Services - Senior Accountant**

**September 2007 – August 2009**

- Prepared, analyzed, and reviewed financial data for 20 Income Statement and Balance Sheet accounts and communicated results to PepsiCo Management
- Served as Project Lead for implementation of process improvement initiatives designed to strengthen internal controls, improve efficiencies, and eliminate redundant processes
- Presented results of reviews to multiple levels of PepsiCo Management (including Corporate Controller) and provided value-added solutions to identified deficiencies

**ERNST & YOUNG LLP; Chicago, IL**

**Business Risk Services – Senior Associate**

**June 2006 – September 2007**

- Managed planning, execution, and reporting phases for Audit and Process Improvement projects, including reporting control issues to client Senior Management and the E&Y leadership team
- Led documentation and testing of key business processes as part of Internal Audit and Sarbanes-Oxley (SOX) 404 Projects for a variety of industries and clients, including the following: Caterpillar, HSBC, Navistar, Tenneco Automotive, ABM Industries, Zurich Financial, and the City of Chicago

**CONAGRA FOODS; Omaha, NE**

**Senior Audit Associate**

**June 2004 – June 2006**

- Led multiple financial, operational, and compliance audits for Retail, Food Ingredients, and Food Service businesses
- Performed substantive and control testing in order to comply with Sections 404 and 302 of the Sarbanes-Oxley Act, with areas of expertise in Trade Promotions Marketing, Commodity and Futures Trading (including derivatives), and Manufacturing

**COMPUTER SKILLS**

Extensive knowledge of Workday, Great Plains, SAP, Net Suite, Business Objects, and all Microsoft Office applications

**ASSOCIATIONS & VOLUNTEER ACTIVITIES**

Member of Spring 2018 Impact Denver Leadership Program

Board Member of Metro Water Recovery

Board Member and Treasurer of Kids in Need of Dentistry (KIND)

Member of Mile High United Way Catalyst Society

Former Member of Mile High United Way's Public Policy Committee (reporting to MHUW's Board of Directors)

**INTERESTS**

Spending time with my Wife and two Daughters, Running Half-Marathons, Travel, Volunteering, and Skiing



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## BAC-8713

### Contact Information

Contact Name	Andrew Johnston	Home Address	450 N Monaco Pkwy
Preferred Phone	303-335-6338	Home City	Denver
Preferred Email	andrew.johnston@denvergov.org	Home State	CO
Other Phone	303-902-5839	Home Zip	80220
Other Email	andrew.johnston@denvergov.org	County	Denver
DOB	[REDACTED]	Hispanic or Latino origin or Descent?	No
SSN	[REDACTED]	Race/Ethnicity	Caucasian
Gender	Male	Other Ethnicity	
Other Gender		Salutation	Mr.

### Board Information

Board Name	Metro Water Recovery	Other boards or commissions served	14th Street General Improvement District
Status	New	Resigned	
Term Start Date			
Term End Date			

### Work Information

Employer	City and County of Denver	Work Address	201 W Colfax Ave Dept 610,
Position	HOST - Catalytic Partnerships	Work City	Denver
Business Phone #	303-335-6338	Work State	CO
Work Email	andrew.johnston@denvergov.org	Work Zip	80220

### Additional Information

Are you a registered voter?	Yes	Objection to appointment?	No
If so, what county?	Denver	Special Information	
Denver City Council District No	5		

### Education and General Qualifications

Name of High School	Marquette University High School	Name of Graduate School	
Location of High School	Milwaukee, WI	Location of Graduate School	
# of Years Attended High school	4	# of Years Attended Graduate School	

Did you Graduate  
High School

Yes

Did you Graduate

Graduate Major

Name of College University of Wisconsin - Milwaukee

Location of College Milwaukee, WI

# of Years Attended  
College 4

Did you Graduate  
College Yes

Undergrad Major Finance

### Reference Details

Reference Name #1 Brad Weinig

Reference Email #1 bradley.weinig@denvergov.org

Reference Phone #1 303-506-3461

Reference Address #1 201 W Colfax Ave Dept 610

Reference Name #2 Shannon Gifford

Reference Email #2 shannon.gifford@denvergov.org

Reference Phone #2 303-478-1558

Reference Address #2 201 W Colfax Ave

Reference Name #3 Margaret Danuser

Reference Email #3 margaret.danuser@denvergov.org

Reference Phone #3 720-913-5547

Reference Address #3 201 W Colfax Ave Dept 1010

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### Notes & Attachments

Andrew Johnston Resume 2-9-23.doc

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Description

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# **Andrew Johnston**

**Catalytic Projects Lead  
Residence: Denver, CO 80220**

## **Career Summary**

In June of 2020, I transferred to the Department of Housing Stability to bring my expertise to voluntary affordable housing agreements, Build Alternative Plans, Linkage Fee negotiations, and the cross departmental strategic planning for the Expanding Housing Affordability effort. These responsibilities were added to existing responsibilities of leading the metroDPA program and Chairman at the Metro Wastewater Reclamation District.

Over the last thirteen years during my tenure with the City and County of Denver, my responsibilities have grown to include the leading, oversight and execution of complex financial structures for non-direct City obligations involving real estate development and housing. Typical structures include layering of tax increment financing, special taxing districts, economic incentives, private activity bonds, single family mortgage backed securities and multifamily housing financing. As a cross departmental leader and subject matter expert on non-direct City financial structures, my recommendations are provided across departments to executives, department heads, and cabinet members including Denver's Chief Housing Officer, Chief Financial Officer and Chief Projects Officer.

My ability to work in a sensitive political environment and maintain relationships with diverse agencies and outside parties have been called upon by the Mayor's Office to assist in relationships with DURA, Adams County, DUSPA/DDA, Central Park/Brookfield, Belleview Station, Westside Development, Fullenwider, National Western, Next Stage plus Airport City negotiations involving DEN, Denver, Adams County, Aurora, Commerce City and Brighton.

I lead a team of external director level professionals to implement the complex financial arrangement for the multi-jurisdictional metroDPA program which provides down payment assistance to home buyers. I innovated the metroDPA Social Equity program providing down payment assistance to residents and direct descendant of people who resided in Denver's historic redlined communities.

Communication strengths have led to successful transactions and motivated employees who are enabled to meet business standards, company goals and personal achievement.

Management skills foster teams with the ability to initialize, create and implement operational business plans while promoting new opportunities from existing relations.

I am a goal-oriented leader who effectively encourages self-motivation and creates the environment to succeed.

Broad-based experience ranging from general accounting practices, property valuation, underwriting (risk analysis), project budgets, communications, contract negotiation, sales, client service, marketing, program development, training, and organizational development.

## **References**

**Margaret Danuser**, Deputy Chief Financial Officer, City and County of Denver  
720-376-1138

**Shannon Gifford**, Deputy Chief Projects Officer, City and County of Denver  
303-478-1558

## **Current Achievements for City and County of Denver**

### **City and County of Denver Department of Housing Stability - *Administrator III – Catalytic Projects Lead* – August 2008 – Present**

In June of 2020, I transferred to the Department of Housing Stability to bring my expertise to voluntary affordable housing agreements, Build Alternative Plans, Linkage Fee negotiations, and the cross departmental strategic planning for the Expanding Housing Affordability effort. These responsibilities were added to existing responsibilities of leading the metroDPA program and Chairman at the Metro Wastewater Reclamation District.

During my thirteen year tenure with Denver, my responsibilities have grown to include the leading, oversight and execution of complex financial structures for non-direct city obligations involving real estate development and housing. Typical structures include layering of tax increment financing, special taxing districts, economic incentives, private activity bonds, single family mortgage backed securities and multifamily housing financing. As a cross departmental leader and subject matter expert on non-direct financial structures, my recommendations are provided across departments to executives, department heads, and cabinet members including Denver's Chief Financial Officer and Chief Projects Officer. Currently I lead a team of external director level professionals to implement the complex financial arrangement for the multi-jurisdictional metroDPA program which provides down payment assistance to home buyers. Additionally, I represent Denver at the Metro Wastewater Reclamation District and have been elected by 39 peers to act as Chairman.

My ability to work in a sensitive political environment and maintain relationships with diverse agencies and outside parties have been called upon by the Mayor's Office to assist in relationships with DURA, Adams County, DUSPA/DDA, Central Park/Brookfield, Belleview Station, Westside Development, Fullenwider, National Western, Next Stage and the Airport City negotiations involving Denver, DEN, Adams County, Aurora, Commerce City and Brighton.

#### **Special Tasks –**

- Metro Wastewater Reclamation District – Chairman of Board of Directors
- metroDPA – Lead of regional down payment assistance homeownership program
- Union Station DDA – Manager for TIF Authority
- Executive Development Council – Capital Project Funding
- Fun Gov Finance Committee Co-Chair – DPAC Redevelopment
- Fin Gov Support - NWSS

**Economic Development** – Over twelve years of developing a cross departmental team to engage on special taxing districts and economic development in support of mayoral goals regarding real estate development and affordable housing opportunities. Tasks include negotiation with key developer stakeholders, interaction with City Council, and direct support to members of the Executive Development Council including the City's Chief Financial Officer and Chief Projects Officer.

**Ten Year Strategic Plan** – Chosen by fellow board of directors on the Metro Waste Water Reclamation District to represent the board's viewpoints in creation, documentation and adoption of a ten year strategic plan projecting \$1.2 billion in capital expenditures. The process integrated employees from all levels and is expected to unify employee efforts for the next decade.

**Central Park** – Member of a team to lead, review and implement the City's intentions at the Stapleton Redevelopment site. Tasks include the review of several multi-party agreements addressing the expenditure of TIF on development projects.

**Union Station** – Coordinated the dissolution of DUSPA including the negotiation between RTD, developers, and metro districts for a solution to restructure the federal loans into two new debt structures between RTD and the DDA (the Union Station TIF Authority)

**Airport City Negotiating Team** - Tasks include confidentially interacting with legal and financial professionals both internal and external to the City to develop and explain tax revenue projections and potential revenue sharing concepts from the planned development of land surrounding Denver International Airport.

#### **Additional Work History**

**Royal Bank of Canada Builder Finance** – *Sr. Manager-Director of Loan Production*-  
March 2003 to August 2008

The primary responsibility of this position is to generate new business with residential housing builders located within the State of Colorado focusing on revenue generation through business development, portfolio management, and risk/loss mitigation. Specific tasks include the following:

- Manage the local 4 member business support team providing direction and advice to ensure a positive work environment including mentoring to develop requisite skills, knowledge and competencies of the team.
- Resolve issues in a positive framework between the local team and the Houston support staff to maintain an effective work environment.
- Ensure an effective process and framework exists to support the Regional Business Plan as validated through measurements and reporting.
- Solicit new business considering the risk return variables inherent in real estate transactions while protecting bank shareholders and establishing client project expectations.
- Effectively present client requests, both orally and written, to bank underwriters and senior loan committee for project financing ranging from \$1,000,000 to \$85,000,000.
- Manage and maintain existing financial relationships with residential builders in accordance to the loan agreement ranging from \$1,000,000 to \$85,000,000 including project progression, disbursement of loan funds, and modifications to legal documentation.

- Recommend action for renewal and extensions.
- Adhere to workplace policies, code of conduct, privacy and information security guidelines.

**Achievements:**

- Growing a fledgling office from \$10 million to over \$200 million in residential projects, mentoring 4 new team members, and establishing the necessary protocols to effectively direct employees in a dynamic work environment.
- Participating in the decentralization of loan closing and documentation activities from the corporate headquarters to 33 field offices including the establishment of job descriptions, work flow and information security protocols.
- Earning the respect of in-house, field, and corporate coworkers.

**Keybank NA- *Client Service Officer*- July 2001 to March 2003**

As a moderator of commercial loan agreements serviced in the Rocky Mountain Region, it was my responsibility to ensure the developers who borrow the bank's money are utilizing bank funds appropriately and continue to meet the various financial standards set forth by the bank in the developer's loan agreement.

**Achievements:**

- Participating in the creation of company wide policies for interest rate swap agreements and derivatives
- Streamlining "Large Corporate" accounts so they can be moved into their own specialized servicing center
- Leader of the monthly client service meeting discussing new issues, financial reporting, maturities, receivables, and developer ratings

**Paramount Realty, Inc./Clarion Mortgage- *Real Estate Agent/ Mortgage Broker*- August 1, 2000 to March 2003**

A member of a seven person real estate team in which each agent brings unique qualities to share with the company. Responsible for closing over \$3 million in residential real estate transaction volume and became essential in coordinating marketing efforts among the agents to maintain existing clients and foster new business opportunities.

**Achievements:**

- Acquiring employing broker status from the state
- Facilitator of company goal and marketing strategy meetings

**Sunwest Properties and Funding- *Business Partner/Manager/Real Estate Agent*- January 1, 1996 through August 1, 2000**

Started the company with the premise to improve customer satisfaction by offering a one stop real estate shop. After the first year, a team of six loan officers and a processor were assembled. By year two, the Salt Lake City branch was established and the team had grown to 14 loan officers plus three processors. My primary function was as a business director, but I took on several roles as needed to help the company flourish. Duties included direct supervision of all staff, creation of marketing to produce inbound sales calls, training, resolution of staff differences, effective communication between branches and divisions, optimization of limited resources, customization of software to improve

efficiency, and proper utilization of the 4 million dollar revolving line of credit.

**Achievements:**

- Encouragement of sales staff to learn and produce more with educational opportunities
- Grow a start up company to over a million in annual revenue in three years
- Create ethical standards for mortgage sales
- Development of the real estate branch for Sunwest
- Mentoring multiple sales people into independent agents and loan originators

**Money Line Mortgage- Loan Officer- May 1994 through December of 1995**

Market available products, convert inbound sales calls, council customers on their options, and communicate both positive and negative information to the customer. Cold calling on local mortgage brokers to solicit difficult transactions and future business.

**Achievements:**

- Top producer third quarter of 1995
- Started using first time home buyer seminars to attract business

**Colorado National Mortgage- Closing Coordinator- May 1993 through May 1994**

At Colorado National Mortgage my responsibilities were to take approved mortgages and produce closing packages including funding execution for the Westminster branch from the central closing office located in the Denver Tech Center. The job entailed coordination with succinct verbal and written communication between underwriters, four processors, eight loan officers, and multiple title companies all at different locations.

**Achievements:**

- Took Denver's busiest branch post closing error rating from 23% to 2%
- Consistently coordinated over 90 closings when the average was 65

**Education**

**University of Wisconsin- Milwaukee- B.S. in Finance 1991.**