



Architectural Standards Data Summary

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Presentation Outline

- Task Force Activities
- Data Findings

Task Force Activities

Management Consulting Approach

- Data Driven approach to Problem/Issues Identification
- Today: Data review and issue identification
- Next Month: Top Level Recommendations

How We Did It: Fact Finding

- Surveys
 - ASO/ASC
 - Homeowners who went through the Permit Process
 - Professionals
 - Architects, Designers, Contractors, Real Estate Agents
- Analyze Available Data from ASO Office
- Comparables Analysis
 - Town of Truckee
 - Other HOAs

Architectural Standards - Continuous Improvement

DATE	ACTIVITY
Feb 2013	HOIP program initiated.
Sept 2015	Board direction to have committee prepare draft Maintenance Standards rules.
May 2016	On-going Maintenance Standards rules adopted by BOD. HOIP program modified to street view rather than Complaints. Deed Transfer/Realtor requests prioritized over GRID.
June 2016	ASO empowered to approve Non-Notification permits.
Aug 2016	Maintenance Permits created – Notice only application along with before/after photos. Elimination of associated fees for Maintenance Permits
Q1 2018	Annie has instituted quarterly survey and has begun other customer service changes

Data Findings

ASO, ASC, Homeowners, Architects,
Contractors, Realtors

AS Missions are not consistent

- TD ASC Mission from Web Page
 - The Architectural Standards Committee (**ASC**) is responsible for administrating the **Architectural Standards Rules**, Procedures and Restrictions for land use and abide by and uphold Tahoe Donner's governing documents (C&R's)
- TD ASO Mission from Web Page
 - The Architectural Standards Office (**ASO**) ensures that structures and properties in Tahoe Donner are in harmony with their natural surroundings and benefit the quality of life and property values of association property owners.
- TD ASO Mission from Internal Documents
 - We assist property owners in understanding and complying with the C&Rs

Permit vs. HOIP ASO Expenses

	Total Expense	Houses Impacted	\$ per House	Total NOR
Total Permit Expenses	-\$176K	251	\$705	(\$88K)
Total HOIP Expenses	-\$81K	284	\$286	\$21K

Work should be done re cost effectiveness of permit processes towards the AS Mission

Costs Per Permit

2017	Major	Minor	Maintenance
Permit Expense	\$60K	\$70K	\$48K
# Projects/Inspections	67	89	95
Cost per Permit	\$888	\$784	\$501
Total NOR	(\$9K)	(\$35K)	(\$46K)

Incomplete Permits Application on Initial Filing (estimate)

15-20%

Final Inspection Fail Rate (estimate)

15-20%

Time to get Homeowner Permit (#1 Complaint)

Not Easily Available

Numbers in Red should be monitored and improved

Primary Reasons for 15% Final Inspection Failure

- Paint missing from bolts and brackets
- Minor deviations to project plans
- No pins or no string lines

Inspection standards are meticulous to the extreme

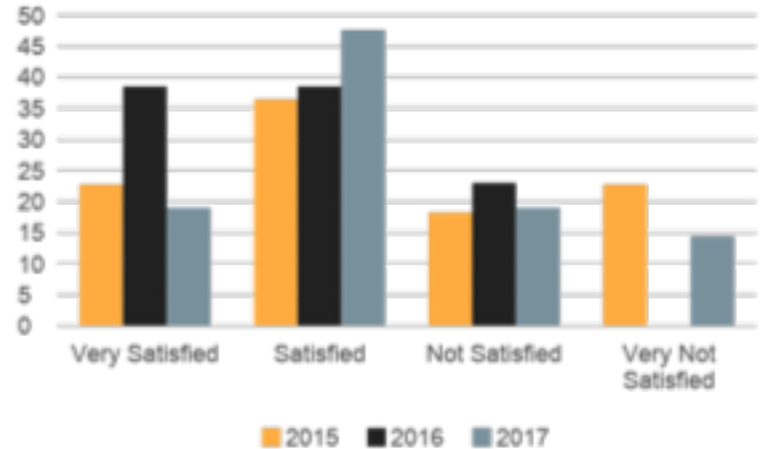
Permit Survey Results: Satisfaction from ASO/ASC

Warning! Small Sample Size

ASO



ASC



Continuous survey feedback will assist in ASO continuous improvement policies

Other Homeowner Survey Numbers

- 97% thought the AS helped protect property values. 93% thought the AS made a positive contribution.
- 84% thought the ASO Staff was helpful.
- 40% thought One-Stop was easy. The other 60% thought it was difficult. Comments indicate some of the 40% were after ASO consultation.
- 33% thought their drawing submittal was appropriate. 33% thought the documentation required was excessive. 70% thought fees were fair.
- 30% thought the TD permit processes disrupted their project. 13% thought it improved their project.

Common Comments

(Homeowner, Design/Build, Real Estate)

- **Different people/different results:** Staff gets high marks for being helpful but multiple complaints about inconsistency between office personnel were made.
- **Communications:** Emails and Phone Calls slow or not being returned was major complaint
- **Slow Process:** Frustrations on the whole are with the ASO/ASC process. The overall process is very slow/inefficient costing applicant more time and money.
- **Onestop:** Mixed Reviews re Onestop. One Stop is a Big Part of the PR Problem
- **HOIP/GRID:** HOIP OK now that it's moved to street view. Would like HOIP/GRID Program to be like Forestry

Other Homeowner Comments

- Many mentioned that scaled site plans were unnecessary for project although one person appreciated knowing about neighbor encroachment

Other Design/Build Comments

- Staff is a fiefdom, overwhelmed and in certain cases not knowledgeable. Staff is too focused on minutia.
- Current Architectural Standards are necessary but are currently over-reaching.
- ASO/ASC should be about aesthetics and not boundaries
- Over the Counter Process necessary with professional/experienced person

Other Real Estate Agent Comments

- ASO systems in place feel “clunky” and cumbersome.
- Minor items cited - major problems for buyers/sellers. Working metal roofs being cited as the most difficult issue
- Need for more consistent use of rules regarding inspection. Re-inspections often bring up new issues.
- Poor First Impression - Welcome letter from TD is a non-compliance HOIP letter

Other Observations

- Tahoe Donner ASO is “blamed” for documentation needed by Truckee Planning
- The ASO departmental operating procedures document is not a “process manual”
- Architectural Standards Rules isn’t up to date with existing procedures

Next Steps

- Annie/Cheryl are already hard at work executing on improvements
- Task Force Writing Up Recommendations
- Target Recommendation Date is July BOD Meeting

Questions?

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Appendix

Taxonomy of ASO/ASC Programs

Who are the users, what is the interface and what are the rules/processes for:

- Permits
 - New Construction (subset of Major Permits)
 - Improvement/Hardscape Construction (previously Major/Minor Permits)
 - Appearance Modification (previously Maintenance Permits)
- HOIP
 - Complaints
 - Real Estate Sales/Deed Transfer
 - GRID

Permit Survey Results: Satisfaction from ASO/ASC

	ASO	ASC
2015	65% Satisfied	59% Satisfied
2016	80% Satisfied	77% Satisfied
2017	72% Satisfied	67% Satisfied
Q1 2018	NA	NA

Should be 4 category bar chart (Very Satisfied, Satisfied, Not Satisfied, Very Not Satisfied - note comments for data)

Continuous survey feedback will assist in ASO continuous improvement policies

Homeowner Survey Common Comments

- Staff gets high marks for being helpful but multiple complaints about inconsistency between office personnel were made
- Emails and Phone Calls not being returned was major complaint
- AS Process taking too long was major complaint
- Mixed Reviews re Onestop
- Many mentioned that scaled site plans were unnecessary for project although one person appreciated knowing about neighbor encroachment

Design/Build Community: Common Comments

- Staff is a fiefdom, overwhelmed and in certain cases not knowledgeable. Staff is too focused on minutia.
- Frustrations on the whole are with the ASO/ASC process. The overall process is very slow/inefficient costing applicant more time and money.
- Current Architectural Standards are necessary but are currently over-reaching.
- ASO/ASC should be about aesthetics and not boundaries
- HOIP is overreacting at the core and should be set up as Grid System
- Over the Counter Process necessary with professional/experienced person
- One Stop is a Big Part of the PR Problem

Real Estate Agent: Common Comments

- Different staff/different results
- ASO is lax in returning emails/phone calls
- ASO systems in place feel “clunky” and cumbersome.
- Minor items cited - major problems for buyers/sellers. Working metal roofs being cited as the most difficult issue
- Need for more consistent use of rules regarding inspection. Re-inspections often bring up new issues.

- HOIP OK now that it’s moved to street view
- Would like HOIP/GRID Program to be like Forestry

- Poor First Impression - Welcome letter from TD is a non-compliance letter