

Tahoe Donner Architectural Task Force

Final Report (draft v.21.6)

2018

The Tahoe Donner Architectural Task Force was created by the Tahoe Donner Board to look into Tahoe Donner Architectural Standards processes. The Task Force surveyed multiple stakeholders using face-to-face interviews, phone interviews and electronic surveys. The task force surveyed homeowners, the design/build professional community, the realty community, neighboring HOA's in the Tahoe Truckee area, the staff of the Architectural Standards Office (ASO) and the members of the Architectural Standards Committee (ASC).

With a declining number of buildable lots in Tahoe Donner, there will be a new wave of homeowner permittees. We would expect to see a continued increase in maintenance permits, minor project permits and major remodeling permits with less pressure for new construction. We believe that to keep up with the changing demographic, plus being responsive to the stakeholders surveyed, the Architectural Standards processes in Tahoe Donner require significant changes that we refer to as "culture-shifts". Rather than quick fixes, culture shifts require a whole new way of thinking. Below are some of the major culture-shifts needed.

- **Mission-focused rather than project-focused:** the question should be, "Does this project help Tahoe Donner achieve its mission for Architectural Standards", rather than focus on "Has every project been permitted and approved?" This shift does not recommend avoiding or eliminating approvals, permits and inspections. Instead, if the project meets the Architectural Standards and the mission statement, the ASO/ASC should do everything they can to document the project as successful and compliant with minimal to no additional paperwork or effort on the part of the homeowner.
- **Avoid duplication of services of other agencies:** The Town of Truckee and the County of Nevada handle the major issues of construction including property boundaries, setbacks and easements. Rather than spending Tahoe Donner time and resources on dealing with these issues, permittees should be referred to these agencies for resolution of any issues. Allowing these agencies to do their job will free up enormous amounts of time and workload for the ASO, ASC and Tahoe Donner.
- **Architectural Standards:** Architectural Standards should be greatly simplified. We strongly recommend the creation of a "Homeowners Guide" which lays out, in simple terms, the steps needed to be followed to accomplish the homeowner's project. The architectural standards should then be modified to be in line with the Homeowner's Guide.
- **Customer Service:** It is imperative that the ASC and ASO view homeowners as partners in maintaining and improving the aesthetics and property values of Tahoe Donner. The attitude of the ASO/ASC should be that their job is not complete until the homeowner is successful in their project. As the ASO is empowered to approve permits and minor exceptions, the approval process will be greatly speeded up resulting in improved homeowner experience plus a reduced workload for the ASO.
- **Covenants & Restrictions:** The Task Force is concerned that over-development is a risk for the Tahoe Donner community. Thus we support keeping the setback and coverage requirements in the C & R's.

On the following pages are the specific recommendations specified by the Task Force.

Architectural Standards Task Force

Final Recommendations

Mission Statement

1. Mission statements for ASC, ASO, and Tahoe Donner should all be consistent. Our recommendation for a mission statement would be as follows:

“Architectural Standards ensure that structures & properties in Tahoe Donner are in harmony with their natural surroundings and benefit the quality of life and property values of association property owners.”

Covenants & Restrictions

1. The Architectural Standards Task Force believes that, with some exceptions, most of the specific rules should be in Architectural Standards adopted by the Board rather than embedded in Covenants that are difficult to revise.
2. C & R's should contain the 35% coverage rules. These are important to maintain low density development. There needs to be a written definition of “coverage” specified in the Architectural Standards rules.
3. Setback rules should be defined in the C & R's for low density development.
4. All language in the C&R's regarding variances should be replaced with the following paragraph.

“The Architectural Standards Committee shall have the authority to grant variances from any provisions in this Article _ and any Architectural and building standards adopted by the Board unless specifically provided otherwise. In granting a variance the Architectural Standards Committee shall consider whether a proposed variance is consistent with environmental value of Tahoe Donner as a mountain community, assures harmonious structures that are consistent with the surrounding mountain environment, and does not impinge on the enjoyment and use of surrounding properties.”

5. Article _ should contain language authorizing the ASC and/or the board to delegate permit approvals to the Architectural Standards Office.
6. Article _ The nonconformity provision is too inflexible. The Task Force believes that there needs to be some less complex procedure for remedying improvements that are not built to plan but still conform to building condition and architectural standards. Substantial conformity requires a broad interpretation that allows minor deviation from submitted plans.

HOIP & GRID Programs

1. Keep GRID program for street view inspections with a posted schedule.
2. The HOIP and GRID programs should establish a special process to deal with-reported “eyesore” properties. We recommend that the number of eyesore eliminations be monitored. There should be a drive-by once a year to confirm and identify any new eyesore properties.
3. Remove deed transfer/point of sale inspections, and replace them with notifications to the new owner of the previous inspection results and the next scheduled GRID inspection.
4. For inspections requested by realty agents, inspection results should be provided to the agents for their disclosure to buyers and sellers.
5. Information about ASO inspections and their requirements should be communicated to the real estate community.

Customer Service

1. Communication between ASO and project applicants should happen in a timely fashion (same day email responses, etc.) In addition, any other required communication, (including inspection results) should immediately be sent to the homeowner via email.
2. Each project application should be paired with a contact person within the ASO who is responsible for assisting the applicant throughout the permit process and is responsible for prompt communication to the homeowner. This will also help in educating the homeowner about the Architectural Standards process.
3. ASO staff should be given discretion to interpret architectural standards consistent with the purpose of the architectural standards to assist the homeowner to complete their project as efficiently as possible.
 - The Task Force believes that the ASO staff is competent and has good judgment. With proper training, they can be trusted to make Architectural Standards decisions with good common sense.
 - The ASO should be delegated the authority to authorize exceptions to the Architectural Standards, and to grant permits for, and inspect and approve all projects except new construction.
4. ASO should schedule one day a week devoted to permit approvals across the counter staffed by an ASO staff member with authority to approve a permit unless the project application requires review by the ASC.
5. The One Stop software, in its current state, is a customer service issue. Homeowners should be allowed to submit projects via a simpler online process, for example, email or Dropbox.

6. We recommend that ASO/ASC/TD continue quarterly homeowners surveys and begin to monitor important metrics such as cost/per/maintenance permit, time required to obtain a homeowner permit, number of complaints, incomplete permit applications on initial filings, final inspection fail rate, and to continue the electronic survey of homeowners involved in the AS process.
7. We recommend the ASO utilize FAQ/Help Desk software (Zendesk.)

Permit Process

1. The required homeowner involvement and time commitment in the AS process should be as minimal as possible, while ensuring that community standards are met and completed projects do not inconvenience their neighbors.
2. Write a Homeowners Guide to Architectural Standards. This guide will provide the homeowner with the appropriate documentation, materials and time expectations needed to complete their project efficiently. This guide should also drive changes in ASO internal process manual and AS Rules. And, as documents are revised, focus should be on the intent of the standards, and less emphasis on approvals.

Homeowner's Guide (*see appendix*) should include the following items:

- Minimum documentation requirements per project type. In many cases, a checklist is sufficient.
 - Project timeline with expectations
 - Project fees
 - Inspections and project completions. Note: Inspections should only focus on the project result. Any deviations from the project application should be automatically approved if they do not violate AS rules.
 - Project complications, variances & appeals
3. For a project for which the Town of Truckee does not require a site plan, no additional site plan should be required by Tahoe Donner. Existing site plans should be acceptable for most homeowner minor projects.
 4. Required project documentation should include plans and information as required to demonstrate that a project or improvement meets Architectural Standards.

Permit Fees

1. For minor projects, fees should not exceed more than 10% of the project cost, defined as either three times the cost of the materials or a bid from a contractor.

Architectural Standards Rules

1. A checklist should be developed of the Architectural Standards documentation that is required for each type of project (new construction, major addition, deck construction, driveway expansion, etc.) (See also “Permit Process item #2”)
2. The Architectural Standards Rules should be reviewed to separate out rules and regulations that are intended for “new construction” versus all other projects.
3. We recommend that Tahoe Donner ASO has a responsibility to inform the project owners about the need to comply with all state, federal and local regulations including setbacks and easements. It is **not** the responsibility of the ASC/ASO to verify and certify that any improvement, structure or activity does not encroach upon any easement, setback or adjacent property line. Nonetheless, no permit should be issued to a project where submitted documentation discloses encroachment on setbacks or easements.
4. Notification: In the case of a major addition or new home construction, notification must be sent to property owners within 200 feet of the project (by email notification.) Notification should include an invitation to contact the project owner/contractor through ASO to discuss questions about the project. ASO shall forward the request to the project proponent who should contact the adjoining property owner directly (with permission) or through ASO.
5. We recommend that the Architectural Standards Rules be updated to reflect other recommendations in this document as well as the Homeowners Manual (see “Permit Process item #2”).
6. Architectural Standards Rules should be reviewed and modifications recommended by the ASO once a year.

Tahoe Donner Architectural Standards Task Force

2018

Charles C. Wu, Task Force Chairperson

Judy DePuy, Task Force Member

Pavel Bosin, Task Force Member

Daniel L. Simmons, Task Force Member

Peter Lynch, Task Force Member

Rick Mitchell, Task Force Member