

## Management Objectives 2019-2020

### Quarterly Reporting

**Vision:** *Tahoe Donner is a vibrant and desirable mountain community, providing attractive and well-maintained facilities, events, programs, and leading customer service to its members, guests, and public, all while maintaining accessible and healthy natural surroundings.*

**Mission:** Tahoe Donner is a recreational homeowner community of 6,500 property owners and over 25,000 members located within Truckee, California, five miles from Donner Lake, and 15 miles from Lake Tahoe. The association operates several recreational facilities and programs including a downhill and cross-country ski area, two restaurants, a championship golf course, equestrian center, and campground. These amenities are available for members and public access. Additionally, the Association manages other amenities for the exclusive use of the property owners and their guests, including tennis courts, hiking trails, playgrounds, pools, a beach club marina on Donner Lake, and a fitness center. Tahoe Donner is comprised of approximately 7,000 acres, with over 4,000 acres of common area, trails and open space interspersed among the community homes.

#### **Guiding Principles:**

- Support the member first and always
- Sustain the foundation of Tahoe Donner programs and services
- Encourage environmental stewardship
- Engage in local community involvement and participation
- Minimize annual operating assessment by allowing homeowners to pay for the amenities they desire to use
- Responsibly maintain, preserve and enhance the common property

#### **Management Objectives 2019-2020**

- 1. Fire Safety**
- 2. Covenants and Architectural Standards**
- 3. Understanding the Member**
- 4. Private Amenity Access Policy and Pricing**
- 5. Cross-Functioning Integrated Systems**

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**3<sup>rd</sup> Quarter 2019 (July-September)**

- Develop management objectives from overall board guidance along with a quarterly reporting system. Five overall areas are outlined below. The 5<sup>th</sup> area – Cross-Functioning Integrated Systems has been revised to eliminate a customer relationship management solutions (CRM) for 2020, and instead focus on proven middleware platforms to allow the upgrade of our online sales platform.

- 1. Fire Safety**
- 2. Covenants and Architectural Standards**
- 3. Understanding the Member**
- 4. Private Amenity Access Policy and Pricing**
- 5. Cross-Functioning Integrated Systems**

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**4<sup>th</sup> Quarter 2019 (October – December)**

**1. Fire Safety**

- Work with ALERT Wildfire and Board to complete MOU, establish project budget and capital expenditure.
- Organize and implement homeowner insurance informational presentation as part of the membership education series plan.
- Develop additional support tool kit pieces for emergency preparedness and homeowner fire safety (defensible space) understanding
- Initiate discussion with TDPUD on undergrounding utilities, create baseline information brief.

**2. Covenants and Architectural Standards**

- Implement opportunity areas for improvement based on member survey feedback
- Reenergize C&R update project. To include updated timeline, recommendations for next steps, legal team to lead the updates, etc.

**3. Understanding the Member**

- Develop and provide monthly/quarterly customer service feedback dashboard
- Expand Likemoji to have HOA customer service categories (ASO, Member Services, Forestry, Safety and potentially Covenants) and launch updated member education campaign
- Expand Zendesk to manage board and senior management emails into the reply tracking and measurement process

**4. Private Amenity Access Policy and Pricing**

- Complete a history of TD Amenity Access Policy and Pricing, researching old newsletters, budget paperwork, and member interviews to learn how amenity access was managed in the past.

**5. Cross-Functioning Integrated Systems**

- Develop a plan to improve and standardize the annual and seasonal training for frontline staff related to our core point of sale systems to improve on the speed of member access while also improving on quality access data capture related to access and sales across all amenities / operations.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**1<sup>st</sup> Quarter 2020 (January – March)**

**1. Fire Safety**

- Establish and formalize relationship with UC Berkley Fire Sciences department for either use of Tahoe Donner as case study, and or paid review/consultation for report on Tahoe Donner forest management to include recommendations for programmatic and treatment changes.
- Develop a membership education series to increase awareness of fire safety and emergency preparedness including lessons learned from relevant regional wildfires. Publish introduction to educational series in April TDNews for membership planning.
- Explore with the TDPUD the feasibility of undergrounding TD's utility lines. On a quarterly basis, report to the Board about any programs which TD would be eligible for that would assist with financing the work.

**2. Covenants and Architectural Standards**

- Review existing and desired timeline for enforcement with required due process established. Following review, draft new board and Architectural and Covenants committee enforcement policy for homes not achieving committee established timelines which are also accruing fines. Policy to consider next step options for action for association to contract work to reduce neighbor aesthetic and defensible space impact. Communicate changes to the membership.
- Communicate baseline information to Board on compliance enforcement for architectural standards through the creation of quarterly report. Review results quarterly.
- Create and implement communication and education campaign to address member perception of standards and enforcement.
- Develop and communicate new initiative under the homeowner inspection program (HOIP) to perform a 100% drive-around visual survey of owner properties in Q2 to identify non-compliant eyesore properties.
- Review Architectural Standards permit process and recommend additional changes to committee and board for improved processes focused on efficiencies and homeowner facilitation ease. Complete benchmark of other homeowner association permit processes. Recommendations based on project survey data, benchmark, simplification focus, and mission alignment.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

- Implement a FAQ and expanded Zendesk for improved member services. Based on multi-departmental customer service improvement initiatives and resource allocation approvals.

**3. Understanding the Member**

- Develop and begin executing on member survey editorial calendar with no more than two surveys per month
- Complete membership personas and demographic analysis
- Work with stakeholder team to create 2020 Member Survey questionnaire

**4. Private Amenity Access Policy and Pricing**

- Review, Summarize, and update the previous news article and membership outreach on the “The Way We Pay” to determine current membership understanding and beliefs in this area.

**5. Cross-Functioning Integrated Systems**

- Conduct an analysis of employee vs contractor option for a centralized online sales and member service function to address the major amenity and homeowner membership interaction functions.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**2<sup>nd</sup> Quarter 2020 (April - June)**

**1. Fire Safety**

- Organize a roundtable meeting with Town of Truckee Emergency Services officials, Truckee Fire Protection District, Cal Fire, US Forestry, utility officials and TD staff to discuss emergency egress needs and alternatives for Tahoe Donner.
- Engage with the Town of Truckee to develop a plan to establish new egress routes, if warranted from emergency management professionals, including necessary funding mechanisms.
- Analyze and communicate emergency notification deficiencies to Town of Truckee Emergency Services as a result of Tahoe Donner's terrain and develop infrastructure to remedy the deficiencies. Develop recommendations for communication to Town of Truckee and/or for Tahoe Donner budgeting and implementation.
- Initiate and coordinate UC Berkley Fire Sciences field study.
- Execute on membership education series starting in Q2 through Q3.

**2. Covenants and Architectural Standards**

- Test effectiveness of communication campaign and education lift with member survey.
- Prepare reporting and recommendations for improvement for committee and board review and approval.
- Continue communication and education campaign lift as detailed in Q1 plan.
- Complete 100% drive-around visual survey of owner properties and identify non-compliant eyesores in community. Cross reference with existing compliance database and addresses any new minimum maintenance non-compliance notification and enforcement processes. Report to committees and board on findings.
- Review architectural standards and covenants quarterly enforcement report with board.

**3. Understanding the Member**

- Provide New homeowner reporting metrics (from welcome survey) and launch exit membership survey program
- Launch and promote 2020 Member Survey (28-day window)

**Management Objectives 2019-2020**  
**Quarterly Reporting**

- Launch location intelligence and population movement insight program, providing location information and baseline demographic data for people inside the Tahoe Donner boundaries and at our facilities.

**4. Private Amenity Access Policy and Pricing**

- Identify the challenges and opportunities within the existing private amenity access policy and pricing structure to improve the member experience at each private amenity.
- Conduct a current data analysis of private amenity access with current data from 2016 until present across all categories of access (member, accompanied guest, and unaccompanied guest). This should include benchmark comparable operations and pricing in the region.
- Develop a member communication plan (articles, surveys, townhall, focus groups, etc.) to determine the current expectations of members related to the private amenities, including access, capacity, pricing, and service levels.

**5. Cross-Functioning Integrated Systems**

- Research and potentially be prepared to implement an appropriate middleware unity API platform to connect the existing systems to a proven eStore platform.
- Develop and implement fiber optic connections solutions to all association facilities to address bandwidth deficiencies related to existing and new cloud-based system integration.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**3<sup>rd</sup> Quarter 2020 (July-September)**

**1. Fire Safety**

- Prepare a recommended budget to implement based on recommendations made by UC Berkeley Fire Sciences Program/Director as presented to Board. Results are expected to continue addressing forest health and removal of fuels on Association owned property at or above current levels; both in expenses and acreage.
- Execute on installation of ALERT Wildfire camera and monitoring system on Tahoe Donner property which integrates with the regional early wildfire detection effort.
- Conduct a Town Hall meeting with insurance professionals to discuss insurance issues as they relate to the status of the industry, insurers reasonings for cancellation. For instance, emergency egress routes, and topography, locations of fire hydrants, etc. Present to Board and educate membership on outcomes.
- Report on the status of the plans with timeline and milestones to establish new egress routes.
- Collaborate with neighboring land owners (USFS, Truckee Donner Land Trust, 7Cs, etc.) to encourage fuels management. To intertwine with existing efforts in large scale landowner fire hazard mitigation projects as organized in emerging consortium.

**2. Covenants and Architectural Standards**

- Review architectural standards and covenants quarterly enforcement report with board.
- Continue communication and education campaign lift as detailed in Q1 plan.

**3. Understanding the Member**

- Provide full report and presentation to the board and membership with results and trends from the 2020 Member Survey
- Complete 2020 Member Survey open-ended feedback analysis
- Identify resources and budget for 2021 Understanding the Member objectives

**4. Private Amenity Access Policy and Pricing**

- Identify recommendations to update to the existing Private Amenity Access Policy and pricing; soliciting membership feedback on draft recommendations, including legal review to ensure updated policy is integrated with association governing documents and

## **Management Objectives 2019-2020**

### **Quarterly Reporting**

due process with the memberships related to any small, fundamental, or significant change from the prior private amenity access policy.

- Seek board review and approval of an updated Private Amenity Access Policy and incorporate the changes into the associations 2021 budget

#### **5. Cross-Functioning Integrated Systems**

- Research and implement a modern online eStore software solution using the coordinated and fielded Unity middleware platform to create a modern and seamless membership access and sales solution for all online sales. Budget estimates for this project should be included in the 2020 budget development process.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

**4<sup>th</sup> Quarter 2020 (October – December)**

**1. Fire Safety**

- Update Tahoe Donner Forest Management Plan for resubmittal to State of California.
- Begin project planning site work for implement the recommendations of the UC Berkeley Fire Sciences results as they apply to board approved recommendations and budget allocation.
- Report on the status of the plans with timeline and milestones to establish new egress routes.
- Initiate discussion with US Forest Service to transfer inholdings to Tahoe Donner or other land conservation entity to achieve continued recreation offerings and allow for fire hazard mitigation and forest health projects to develop.

**2. Covenants and Architectural Standards**

- Review architectural standards and covenants quarterly enforcement report with board.
- Continue communication and education campaign lift as detailed in Q1 plan.

**3. Understanding the Member**

- Provide year-end feedback summary dashboard for 2020
- Set 2021 survey editorial calendar
- Lock 2021 Understanding the Member objectives and resources Q1 Objectives
- Develop and begin executing on member survey editorial calendar with no more than two surveys per month
- Complete membership persona and demographic analysis

**4. Private Amenity Access Policy and Pricing**

- Communicate changes to the membership and begin updated policy implementation frontline training and implement update policy.
- Develop and launch a private amenity policy membership monitoring and feedback program to quickly ascertain membership understanding and receptions of new access policy coupled with actual utilization data monitoring.

**Management Objectives 2019-2020**  
**Quarterly Reporting**

5. **Cross-Functioning Integrated Systems**

- eStore go live