

5-Year Strategic Plan Workshop | 2021-2026

October 23, 2020



PURPOSE OF TODAY'S MEETING

- Agree on the purpose and value of the 5-Year Strategic Plan
- Review Member Survey Data
- Agree on Six Strategic Initiatives
- Review and comment on Draft Strategic Plan
 - Initiatives, Goals and Objectives

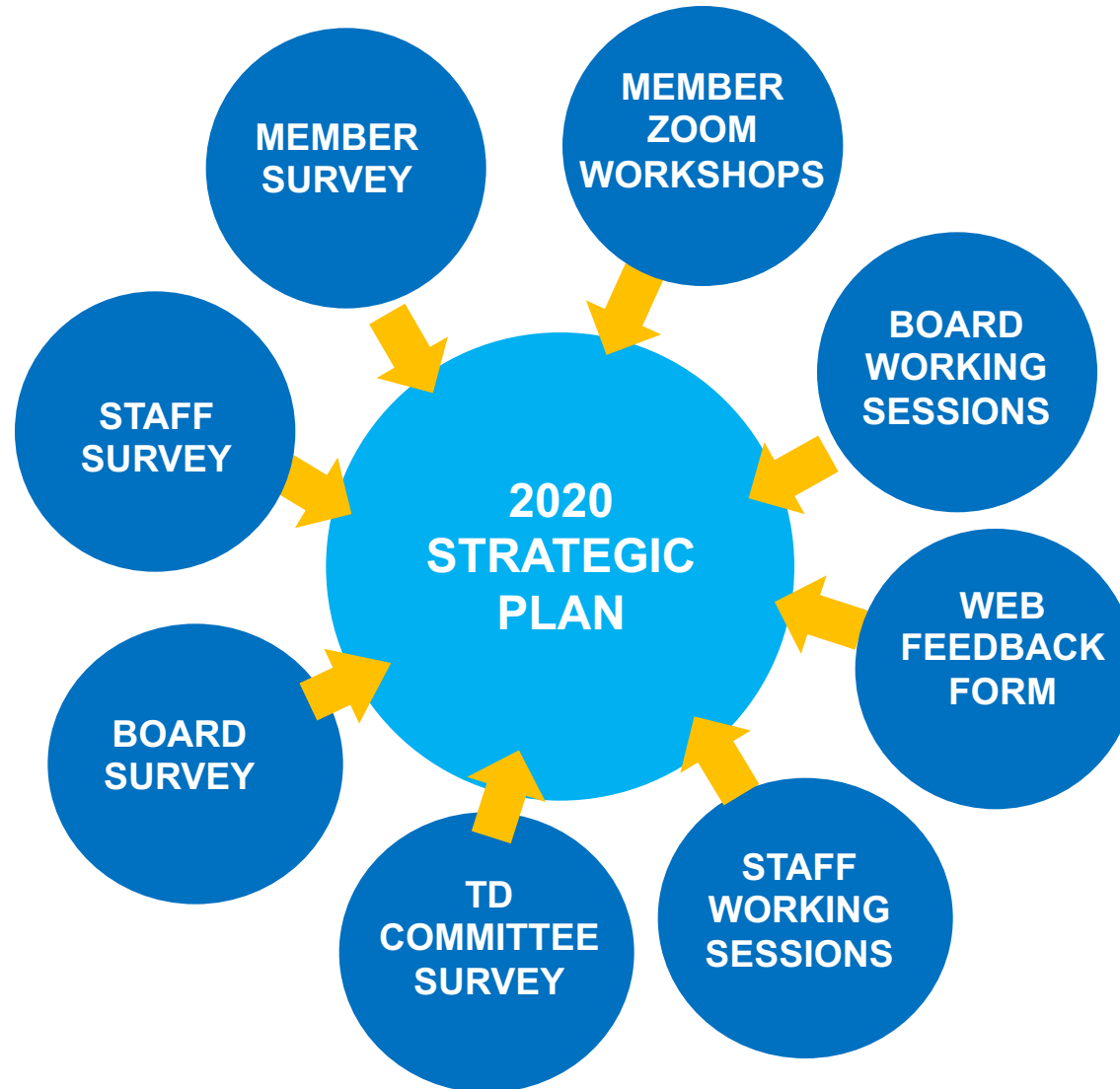


BACKGROUND

- TASK: Update Tahoe Donner's 5-Year Strategic Plan and Enhance to Include Goals, Objectives and Measurements
- Process Begins in January 2020 and Draft #1 Presented at March 2020 Board Meeting
- Five Total Staff Work Sessions Between March to September 2020
- September 2020: Significant Marketing Outreach Effort to Solicit Input from Membership, Board, Committee Members and Staff on Goals and Priorities
- Survey Feedback Refined and Prioritized the Working Draft 5-Year Strategic Plan for Review Today



WAYS WE HAVE GOTTEN DIRECTION AND FEEDBACK FOR THE STRATEGIC PLAN



ONE-STOP FOR STRATEGIC PLAN INFORMATION

tahoedonner.com/strategic-plan

- Summary Reports
- Presentation
- Feedback Form
- Overview and Timeline



STRATEGIC PLAN

[Strategic Plan Feedback Form](#)

Strategic Plan

WHY A STRATEGIC PLAN AND GOALS

Strategic planning sets priorities for accomplishing intended outcomes and goals within Tahoe Donner and determines the actions, plans and resources required to achieve our mission and vision. By taking a critical look at fundamental issues that require attention and focusing on members, staff and partners for input, we can together create the blueprint for a stronger future. While plans are like a road map and may change to reach a destination, the moves created are intentional and proposed for deliberate progress.

4 PILLARS OF INPUT AND DIRECTION

1. Members will guide this process via survey and Zoom feedback sessions. Members will help address key strengths and weaknesses of the association and prioritize these issues.
2. Tahoe Donner staff will also use their intimate knowledge of the association to address key issues through a survey and working sessions.
3. Committee members and community partners will provide feedback in an additional survey.
4. Tahoe Donner Board of Directors will ultimately review all data provided by the other three pillars, work to create priorities and refine the plan through objectives and measurables. Once complete, the board will approve the plan and staff will use the road map to enhance and better Tahoe Donner for the entire community.

TIMELINE + HOW TO PARTICIPATE

Information gathering will take place throughout the fall.

Key Dates:

- Staff Workshops: August
- Staff Survey: Early September
- Committee Surveys: Early September
- Board Survey: Early September
- Member Workshops:
 - September 16 | 10AM ([click for Zoom login info](#))
 - September 17 | 4:30PM ([click for Zoom login info](#))
- Member Survey: Late September
- Board Workshops:
 - October 23 | 9-10:45AM (*previously advertised as October 14*)
 - https://zoom.us/webinar/register/WN_SzuNg6piQSWgnIXMLdu6oQ
 - November 5
- Board Meeting: TBD

FEEDBACK AND SURVEY SUMMARY REPORTS + PROJECT DOCUMENTS

- [October 23 Workshop Presentation](#)
- Survey Summary Reports
 - [Member Survey Summary Report](#)
- Member Zoom Workshop Summary Report
 - [September 16 Strategic Plan Feedback Summary](#)
 - [September 17 Strategic Plan Feedback Summary](#)

FEEDBACK FORM

To submit feedback concerning the 2020 strategic plan, [click here](#).

STRATEGIC PLAN OUTREACH + PROCESS

WHAT	DATE
TD News Article - Strategic Plan: Why, how to give feedback, timeline	Published 9/1
TD Staff Working Session	8/20
Web Portal Live – Page includes about, feedback form, key dates, documents	8/24
Board Meeting Presentation by GM	8/28
Dedicated Email from GM – Overview, Important and Zoom meeting invite	8/31
Staff, Board, Committee Surveys Live	9/15-9/21
Member Zoom Feedback Meetings	9/16 and 9/17
Member Survey	9/22-9/28
Dedicated Member Email w/ Published feedback and updated timeline	10/12
Board Workshop #1 – Data review and feedback on draft plan	10/23
Refine and Finalize Strategic Plan Document Based on Feedback	10/23-11/5
Board Workshop #2 – Adjusted plan based on feedback and potential approval	11/5
Adopt and Publish Plan Outreach to Membership	TBD

WHAT AND WHY OF STRATEGIC PLANNING

- At its core, strategic planning is the process of defining the goals of Tahoe Donner for the immediate future and the strategies by which these goals will be achieved.
- Strategic planning also establishes operational priorities and outlines the actions, plans and resources required to achieve Tahoe Donner's mission and vision.



ELEMENTS OF A STRATEGIC PLAN

- **Strategic Plan:** The road map to guide the Tahoe Donner Association towards accomplishing its vision and mission, and the plan to follow.
- **Strategic Initiatives:** Initiatives are the distinct and interdependent areas of governance, management and operations that comprise the means through which Tahoe Donner translates its vision and goals into practice.
- **Outcomes:** Outcomes are the effect that homeowner's want as a results.
- **Goals & Objectives:** Goals are the intended specific results to achieve under each Strategic Initiative. Objectives are strategies, action plans and milestones to pursue to achieve the goals.
- **Measurements & Metrics:** The observable and measurable effect that provides objective evaluation of accomplishment of goals and objectives.



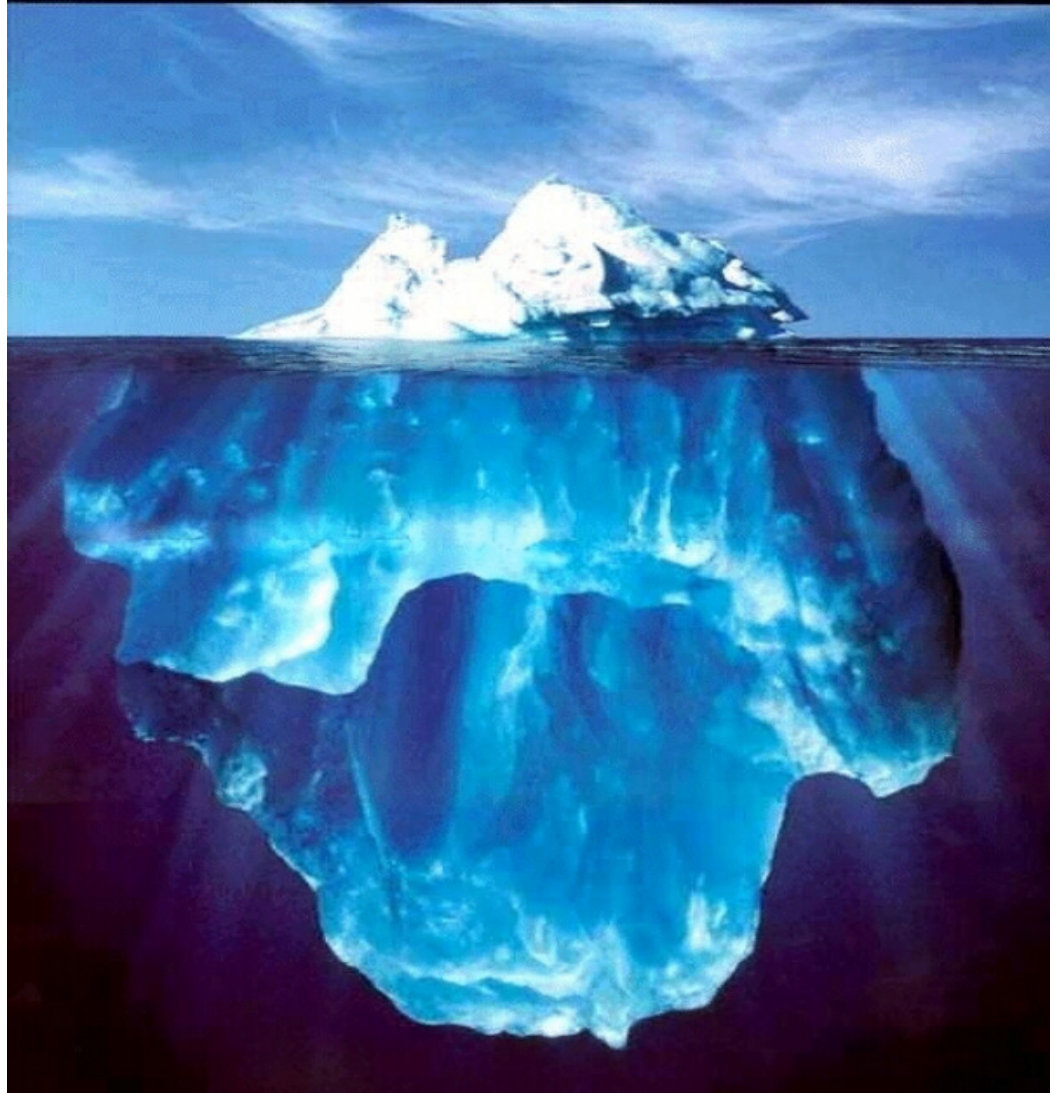
WHERE SHOULD THE BOARD FOCUS ITS ATTENTION ON?

10%

New initiatives, projects
and individual and
isolated issues

90%

Ongoing management
and operations and
organizational issues



WHAT ARE THE 3-5 MOST SIGNIFICANT ISSUES INFLUENCING TAHOE DONNER'S PRESENT REALITY AND ITS FUTURE?



VISION, MISSION AND VALUES

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-oriented mountain residential community whose mutual benefit association of 6,500 owners provides for the standards, regular operation and long-term maintenance of programs, facilities and open-space. Through continuous improvement, customer service and fiscal accountability, the association maintains leading standards of natural resource stewardship, facilities, programs and services to benefit the owners/members. Organizational effectiveness and innovation within the association are sustained by maintaining a highly professional board of directors, staff and homeowner committee volunteers, while also engaging the local community in an effective and collaborative relationship.

VALUES

Organizational Effectiveness, Collaboration, Fiscal Accountability, Professionalism, Continuous Improvement, Responsibility, Resource Conservation, Stability, Community Participation, Respect



PROPOSED STRATEGIC PLAN INITIATIVES



INITIATIVE #1: SAFE COMMUNITY

Tahoe Donner community is safe and prepared to prevent and respond to emergencies through partnerships with local public safety agencies, risk management practices and public education.



INITIATIVE #2: RECREATION OPPORTUNITIES

Homeowners and visitors benefit from an abundance of public and private amenities, leisure programs and natural recreation areas that make the Tahoe Donner community a great place to live and play.



INITIATIVE #3: HIGH-PERFORMING AND FISCALLY RESPONSIBLE ORGANIZATION

Tahoe Donner is governed and managed in an efficient and effective manner that maximizes return on investment from annual assessments and earned income and achieves a high level of member satisfaction.



INITIATIVE #4: ENVIRONMENTAL STEWARDSHIP

Tahoe Donner provides responsible stewardship of the community's natural resources and responsible land management of its 5,000 acres of open space.



INITIATIVE #5: PLANNING, DEVELOPMENT AND INFRASTRUCTURE

Tahoe Donner plans, develops and maintains association-owned land, infrastructure and recreation amenities that meet homeowner needs and ensure quality home building and upkeep through covenants and architectural standards.



INITIATIVE #6: CREATE AN INFORMED, INVOLVED AND LIVABLE COMMUNITY

Homeowners are informed and are involved in creating and sustaining a vibrant and livable community.

ZOOM MEMBER WORK SESSION FEEDBACK SUMMARY

September 16 and 17

Intent of Zoom Workshops: As we develop the member survey, feedback from zoom workshops guides survey development, validates strategic initiative categories and identifies goals to pursue.

TOP RECCURRING THEMES

- Improved Internet Connectivity
- Roadways, Traffic and Access Egress
- User Fees and Amenity Access
- Impact of Increased Demand vs Capacity
- Annual Assessment
- Reservation System
- Importance of Trails and Open Space
- Improved Sustainability Practices
- Advocacy with Partner Agencies
- Greater Communication and Transparency in Governance



INITIATIVE #1: SAFE COMMUNITY



INITIATIVE #2: RECREATION OPPORTUNITIES



**INITIATIVE #3: HIGH-PERFORMING AND
FISCALLY RESPONSIBLE ORGANIZATION**



**INITIATIVE #4: ENVIRONMENTAL
STEWARDSHIP**



**INITIATIVE #5: PLANNING, DEVELOPMENT
AND INFRASTRUCTURE**

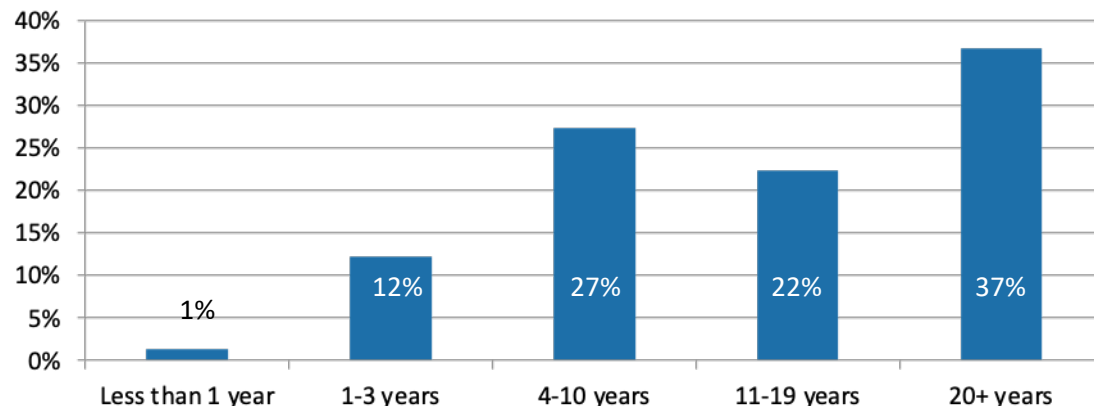


**INITIATIVE #6: CREATE AN INFORMED,
INVOLVED AND LIVABLE COMMUNITY**

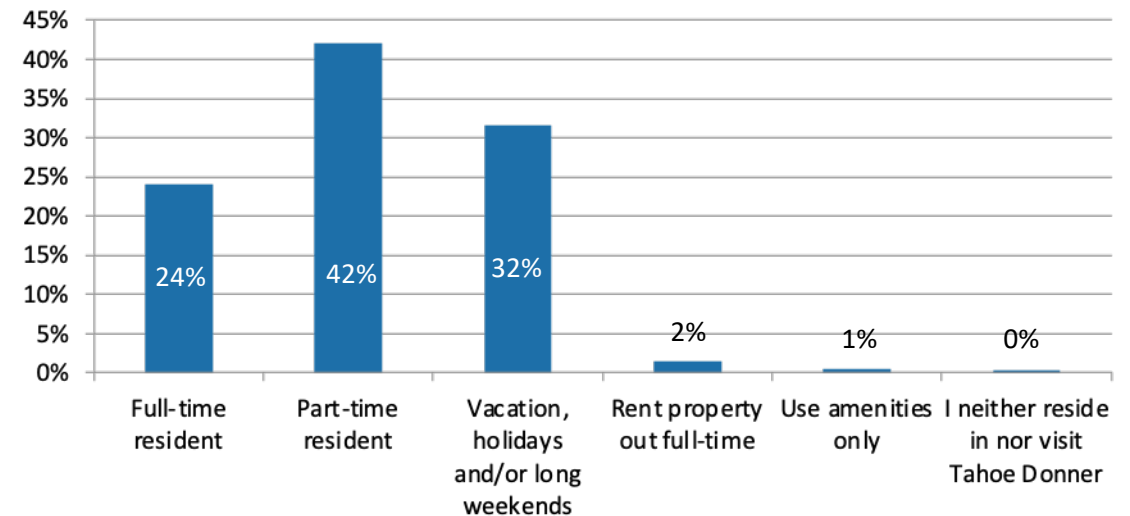
STRATEGIC PLAN MEMBER SURVEY

- Online Survey, Email to Members and Nextdoor Invitations
- 2,506 Responses
- Open September 20-28
- Demographics (below)

How long have you been a Tahoe Donner owner?



Which best describes YOUR use of your Tahoe Donner property?



TD'S BIGGEST STRENGTHS ARE TRAILS AND OPEN SPACE, QUALITY OF RECREATION/AMENITIES AND GREAT LOCATION

MEMBERS' RESPONSE: In your opinion, what are the biggest strengths of Tahoe Donner? Check all that are important to you.

ANSWER CHOICES	RESPONSES	
The wide range of trails and open spaces	78.56%	1964
The quality of recreation opportunities/amenities	77.28%	1932
A great location	72.48%	1812
The quiet/peaceful community	65.04%	1626
A safe place to live/own a home	62.84%	1571
The strong forestry/fire safety	53.56%	1339
Family-oriented; there are many activities for all ages	50.52%	1263
HOA standards that keep it looking better than many other Truckee/Tahoe neighborhoods	36.80%	920
Great neighbors	21.20%	530
The best value for my real estate dollar	15.88%	397
Homes that are nicer than those in other Truckee/Tahoe neighborhoods	15.76%	394
The active calendar for social activities	14.60%	365
A great place for owning a rental property	13.00%	325
Other (please specify)	3.84%	96

TD'S BIGGEST CHALLENGES ARE OVERCROWDING AMENITIES, FIRE RISK AND INCREASE IN ASSOCIATIONS FEES/COSTS

MEMBER RESPONSE: In your opinion, what are the prevailing challenges that should be addressed in Tahoe Donner? Check all that apply.

ANSWER CHOICES

RESPONSES

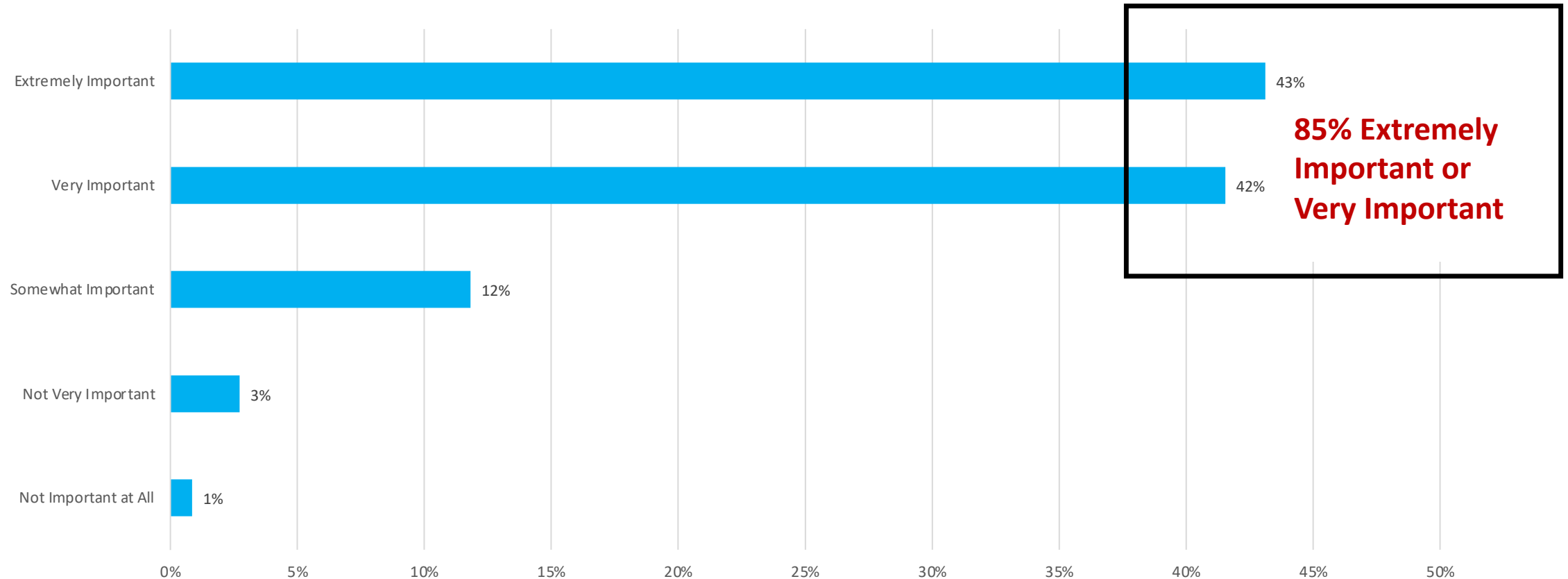
Overcrowding at amenities	45.49%	1085
Fire risk	43.82%	1045
Increase in association fees/costs	40.29%	961
Aging Tahoe Donner buildings/facilities	25.20%	601
Noise by my neighbors and their guests	23.90%	570
Not enough enforcement of rules	23.86%	569
Steady influx of people in the community	21.93%	523
Other (please specify)	15.64%	373
Architectural Standards rules are too strict	15.35%	366
Employee/affordable housing	14.51%	346
Open space land management	10.94%	261
Not enough amenities	7.04%	168
Lack of opportunity to get involved/provide feedback in TD governance	6.33%	151
Trespassing on my property	6.25%	149
Customer service provided by Tahoe Donner staff	4.40%	105
How COVID-19 has been handled	4.36%	104

Recurring Themes from "Other" Replies

- Amenity Access Policy
- STR Policy and Enforcement
- Undergrounding Utilities
- Third Egress Route
- Speed Limit Enforcement
- Poor Internet Options
- Pizza on the Hill Reopening
- Dogs (poop on streets, trespassing, dog park)
- Dilapidated Properties
- Bike-Friendly Community (Class-1 bike path)
- Hostility Between Membership

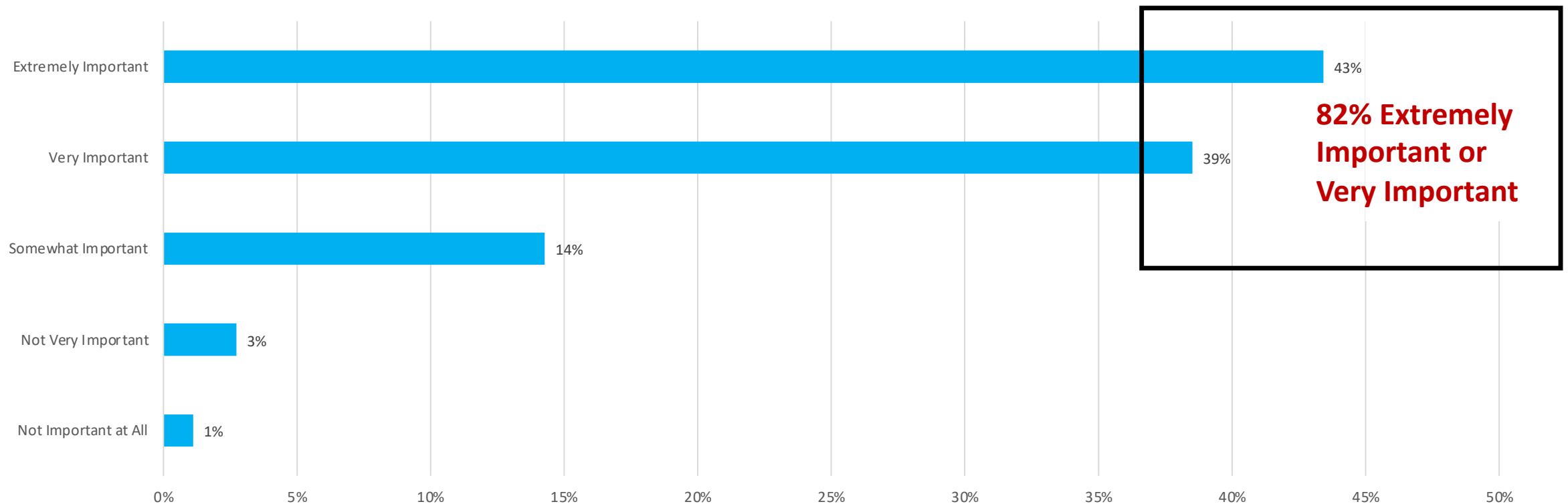
HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? **SAFE COMMUNITY**

Safe Community: The Tahoe Donner community is safe and prepared to prevent and respond to emergencies through partnerships with local public safety agencies, risk-management practices and public education.



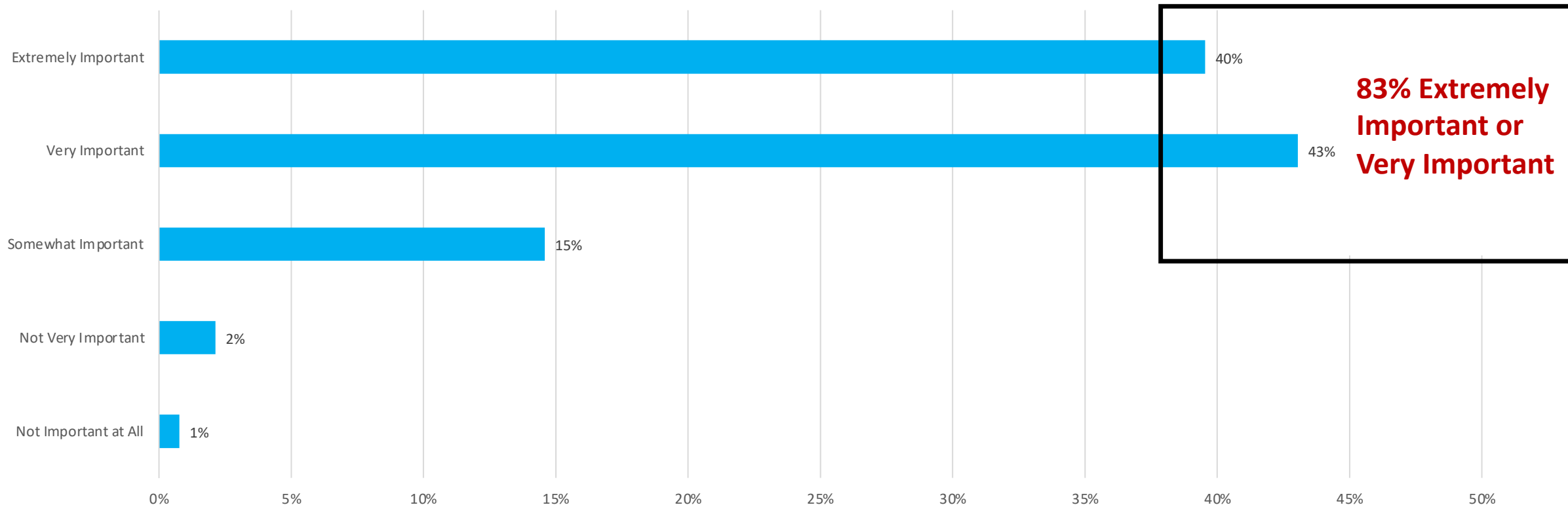
HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? RECREATION OPPORTUNITIES

Recreation Opportunities: Homeowners and visitors benefit from an abundance of public and private amenities, leisure programs and natural recreation areas that make the Tahoe Donner community a great place to live and play.



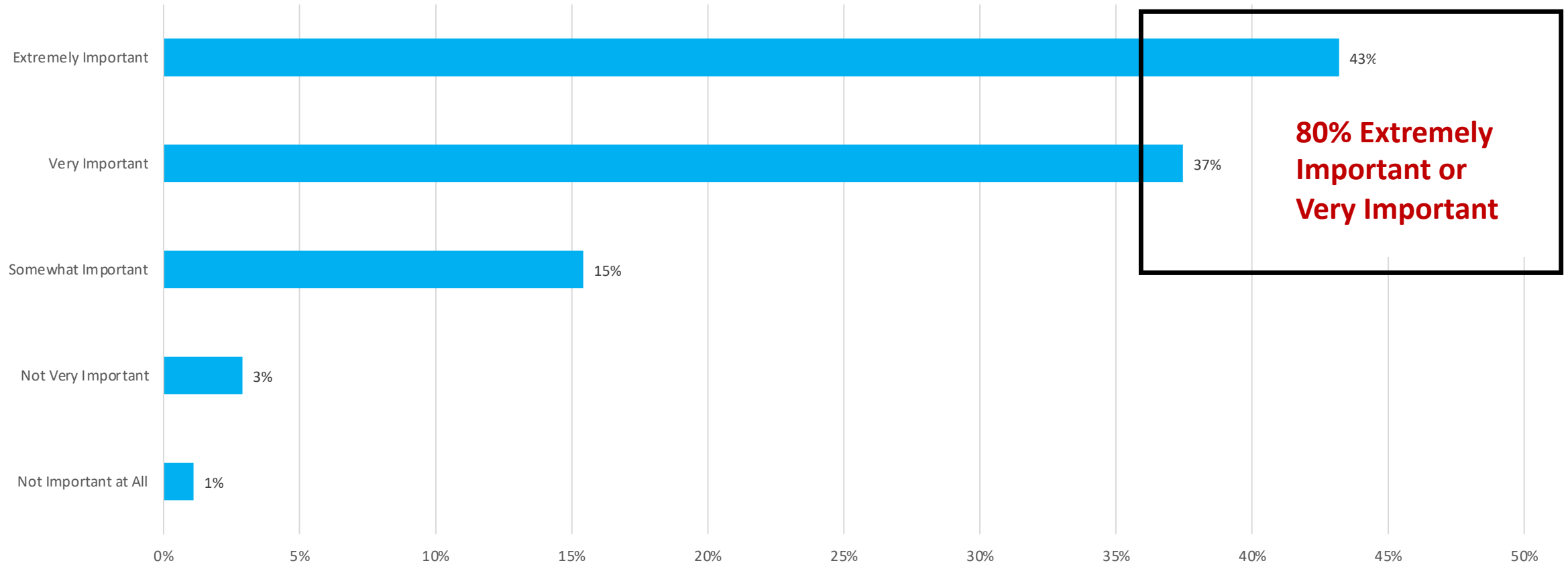
HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? HIGH-PERFORMING AND FISCALLY RESPONSIBLE ORGANIZATION

High-Performing and Fiscally Responsible Organization: Tahoe Donner is governed and managed in an efficient and effective manner that maximizes a return on investment from annual assessments and earned income and achieves a high level of member satisfacti



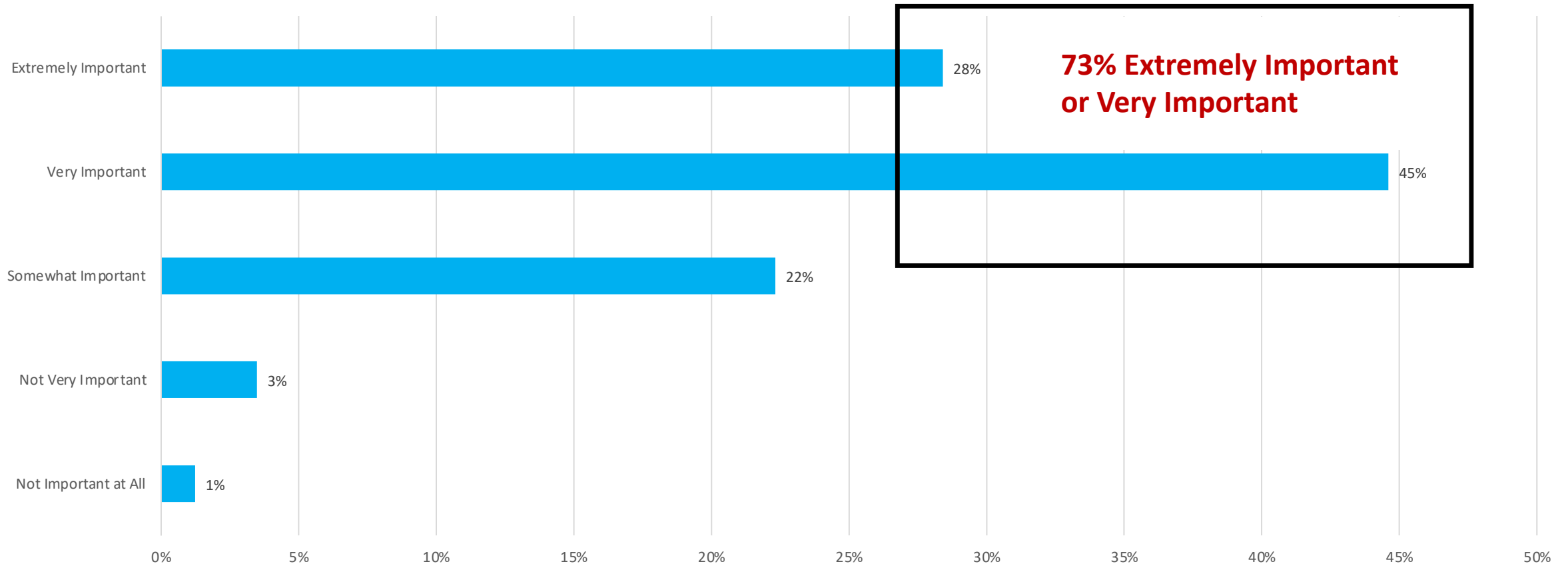
HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? ENVIRONMENTAL STEWARDSHIP

Environmental Stewardship: Tahoe Donner provides responsible stewardship of the community's natural resources and responsible land management of its 5,080 acres of open space.



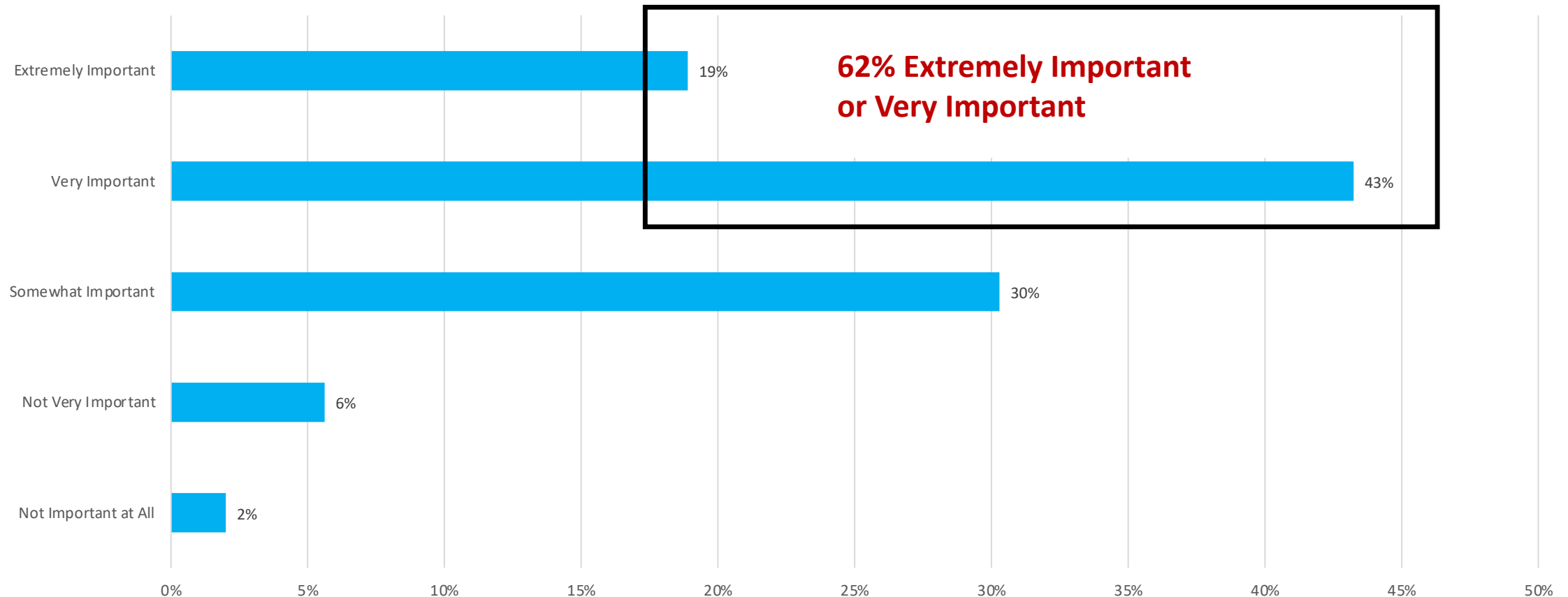
HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? PLANNING, DEVELOPMENT AND INFRASTRUCTURE

Planning, Development and Infrastructure: Tahoe Donner plans, develops and maintains association-owned land, infrastructure and recreation amenities that meet homeowner needs and ensure quality home building and upkeep through covenants and architectural



HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU? CREATE AN INFORMED, INVOLVED AND LIVABLE COMMUNITY

Create an Informed, Involved and Livable Community: Homeowners are informed and involved in creating and sustaining a vibrant and livable community.



SUMMARY: HOW IMPORTANT ARE EACH OF THE FOLLOWING POTENTIAL INITIATIVES TO YOU?

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
SAFE COMMUNITY: The Tahoe Donner community is safe and prepared to prevent and respond to emergencies through partnerships with local public safety agencies, risk-management practices and public education.	1%	3%	12%	42%	43%	85%
RECREATION OPPORTUNITIES: Homeowners and visitors benefit from an abundance of public and private amenities, leisure programs and natural recreation areas that make the Tahoe Donner community a great place to live and play.	1%	3%	14%	39%	43%	82%
HIGH-PERFORMING + FISCALLY RESPONSIBLE ORGANIZATION: Tahoe Donner is governed and managed in an efficient and effective manner that maximizes a return on investment from annual assessments and earned income and achieves a high level of member satisfaction.	1%	2%	15%	43%	40%	83%
ENVIRONMENTAL STEWARDSHIP: Tahoe Donner provides responsible stewardship of the community's natural resources and responsible land management of its 5,080 acres of open space.	1%	3%	15%	37%	43%	80%
PLANNING, DEVELOPMENT + INFRASTRUCTURE: Tahoe Donner plans, develops and maintains association-owned land, infrastructure and recreation amenities that meet homeowner needs and ensure quality home building and upkeep through covenants and architectural standards.	1%	3%	22%	45%	28%	73%
CREATE AN INFORMED, INVOLVED + LIVABLE COMMUNITY: Homeowners are informed and involved in creating and sustaining a vibrant and livable community.	2%	6%	30%	43%	19%	62%

COMMITTEE, BOARD AND STAFF SURVEY RESULTS SUMMARY

Responses Were Coded by a Third-Party Research Firm to Produce Themes

STRENGTHS OF TAHOE DONNER

- Recreation Opportunities and Amenities
- Trails and Open Space
- Great Neighbors
- Welcoming and Helpful Staff

CHALLENGES AND OPPORTUNITIES OF TAHOE DONNER

- Fire Risk
- Aging Facilities
- Amenity Demand/Capacity
- Rules and Enforcement
- Staffing Challenges

CONSISTENT THEMES FROM BOARD, STAFF AND COMMITTEE SURVEYS

Responses Were Coded by a Third-Party Research Firm to Produce Themes

STANDOUT PRIORITIES AND PROJECTS

- Fire Safety and Education, Forest Management
- Financial Planning for Investments
- Fiscal Transparency
- Upkeep of Amenities/Facilities
- Continued Communication from Board/Staff
- Ski Lodge Improvement
- Investing in Staff
- Short-Term Rental Management
- Adapting to Changing Demographics

HOW IMPORTANT ARE THESE IN THE MEMBERSHIP'S EYES

Survey Question: “Listed below are several other key goals, projects or initiatives for Tahoe Donner. **How important are each of these goals to you?**”

Intent: Focus on what is most important to the membership. The following goals received a 50% or higher ranking as very important or extremely important.



SAFE COMMUNITY

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Proactively approach fire prevention practices and prevention education.	1%	1%	9%	32%	57%	89%
Foster and maintain a good working relationship with police, fire, public utility district and other local agency partners.	1%	3%	21%	43%	33%	76%
Identify opportunities to improve alert and warning measures in partnership with local public safety agencies.	2%	7%	29%	39%	22%	61%
Maintain amenities with safety as a top priority.	2%	7%	31%	41%	18%	59%
Partner with the Town of Truckee to address road safety, including road/bike integration, signage and speed education.	2%	9%	32%	36%	21%	57%

RECREATION OPPORTUNITIES

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Provide an extensive system of well-maintained trails, bike paths, natural areas and accessible open space.	1%	3%	15%	34%	48%	81%
Develop and implement amenity access policy and pricing to ensure appropriate and cost-effective utilization of Tahoe Donner amenities and programs.	2%	8%	31%	40%	19%	60%



HIGH-PERFORMING AND FISCALLY RESPONSIBLE ORGANIZATION

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Refine a long-term financial plan for capital improvements, preventative maintenance and infrastructure replacement.	1%	3%	20%	46%	30%	76%
Attract, develop and retain a capable and diverse workforce to manage, maintain and operate Tahoe Donner.	3%	5%	29%	45%	18%	63%
Develop amenity business plans/new operational strategies to lower expenses, increase revenue and optimize utilization.	3%	8%	28%	39%	22%	61%
Implement technology tools that improve efficiency, effectiveness and member experience.	2%	8%	37%	38%	15%	53%



ENVIRONMENTAL STEWARDSHIP

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Update the Trails Master Plan to continue to improve trail development, signage and usage.	2%	6%	25%	38%	29%	67%
Protect, restore and enhance the unique ecosystems and habitats found in Tahoe Donner.	2%	7%	25%	35%	31%	66%
Prepare for the impacts of climate change and seasonal weather changes that will affect operations and the health of Tahoe Donner's natural resources.	7%	8%	22%	32%	31%	64%
Coordinate overall land management operation by integrating the recreational and non-recreational portions of open space.	3%	9%	37%	35%	16%	51%



PLANNING, DEVELOPMENT AND INFRASTRUCTURE

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Play an active role with the Town of Truckee and other agencies to gain a better internet connection.	4%	7%	19%	28%	43%	70%
Ensure all new capital projects prioritize the preservation of the health and sustainability of Tahoe Donner’s natural resources, forests, wetlands and wildlife.	3%	6%	23%	37%	31%	68%
Develop a comprehensive land use and facilities master plan that incorporates updating the plans for forestry, trails, open space and facilities.	2%	6%	32%	40%	20%	60%
Develop and implement a five-year approved capital improvement program with corresponding funding.	4%	7%	32%	41%	16%	56%

CREATE AN INFORMED, INVOLVED AND LIVABLE COMMUNITY

The following goals received a 50% or higher ranking as very important or extremely important

	Not Important at All	Not Very Important	Somewhat Important	Very Important	Extremely Important	VERY OR EXTREMELY IMPORTANT
Continue to conduct member surveys and other feedback efforts to understand member needs and priorities.	1%	3%	23%	43%	31%	73%
Enhance transparency reporting related to the budget process.	1%	6%	31%	38%	24%	62%
Encourage and facilitate homeowner involvement in Tahoe Donner governance and decision making.	1%	8%	37%	39%	14%	53%

TOP 10 MOST IMPORTANT GOALS

Percentage = combined total of “extremely important” or “very important” responses in Member Strategic Plan Survey

1. **89%:** Proactively approach fire prevention practices and prevention education.
2. **81%:** Provide an extensive system of well-maintained trails, bike paths, natural areas and accessible open space.
3. **76%:** Foster and maintain a good working relationship with police, fire, public utility district and other local agency partners.
4. **76%:** Refine a long-term financial plan for capital improvements, preventative maintenance and infrastructure replacement.
5. **73%:** Continue to conduct member surveys and other feedback efforts to understand member needs and priorities.
6. **70%:** Play an active role with the Town of Truckee and other agencies to gain a better internet connection.
7. **68%:** Ensure all new capital projects prioritize the preservation of the health and sustainability of Tahoe Donner’s natural resources, forests, wetlands and wildlife.
8. **67%:** Update the Trails Master Plan to continue to improve trail development, signage and usage.
9. **66%:** Protect, restore and enhance the unique ecosystems and habitats found in Tahoe Donner.
10. **64%:** Prepare for the impacts of climate change and seasonal weather changes that will affect operations and the health of Tahoe Donner’s natural resources.

DRAFT STRATEGIC PLAN FOR REVIEW



TAHOE DONNERSM

TERMS AND EXAMPLE OF WHAT THE TERMS REPRESENT

STRATEGIC INITIATIVE: INITIATIVES ARE THE DISTINCT AND INTERDEPENDENT AREAS OF GOVERNANCE, MANAGEMENT AND OPERATIONS THAT COMPRISE THE MEANS THROUGH WHICH TAHOE DONNER TRANSLATES ITS VISION AND GOALS INTO PRACTICE.

Outcome: Tahoe Donner is successful when X happens

GOAL AND OBJECTIVES: Goals are the intended specific results to achieve under each Strategic Initiative. Objectives are strategies, action plans and milestones to pursue to achieve the goals.

- a) X
- b) X
- c) X

MEASUREMENTS AND METRICS: The observable and measurable effect on members, customers, the environment, or infrastructure that provides objective evaluation of accomplishment of goals and objectives. To be added and adjusted on an annual basis and as a part of annual goal setting.

INITIATIVE #1. SAFE COMMUNITY

Outcome: Tahoe Donner is a safe community and prepared to prevent and respond to emergencies through partnerships with local public safety agencies, risk management practices and public education.

GOAL AND OBJECTIVES 1.1: FIRE PREVENTION EDUCATION & PRACTICES

- a) A proactive approach to maintaining the health of Tahoe Donner natural resources is established for fire safety through Tahoe Donner's Forest Management Plan & Homeowner Defensible Space Inspection Plan.
- b) Homeowners are educated about fire prevention and emergency preparedness and evacuation.

GOAL AND OBJECTIVES 1.2: PUBLIC AGENCY PARTNERSHIPS

- a) Tahoe Donner maintains good working relationships with the Town of Truckee for Police services and the Truckee Fire Protection District and advocates and partners with each to insure satisfactory levels of public health and safety, emergency response, fire hazard reduction and crime prevention.
- b) Tahoe Donner maintains positive working relationships with PUD, Town of Truckee, Truckee Land Trust, Regional Water Quality Control Board, Forest Service, Department of Fish and Wildlife, Mountain Housing Council and neighboring landowners.

GOAL AND OBJECTIVES 1.3: ENSURE EMERGENCY PREPAREDNESS

- a) Develop and train staff in all departments on emergency preparedness and emergency action plans.
- b) Identify opportunities to improve alert and warning measures in partnership with local public safety agencies.
- c) Members are educated about evacuation routes and warning systems.

GOAL AND OBJECTIVES 1.4: MAINTAIN SAFE CONDITIONS OF ASSOCIATION OWNED PROPERTY & FACILITIES

- a) Develop, maintain, operate and inspect infrastructure, facilities and trails to insure safe & operable condition
- b) Amenities are supervised and operated to prevent accidents or illness where possible.
- c) Health and safety mitigation measures implemented and complied with per State and local regulations.

INITIATIVE #2: QUALITY OF LIFE & RECREATION

Outcome: Homeowners & visitors benefit from an abundance of public & private amenities, leisure programs and natural recreation areas that make the Tahoe Donner community a great place to live and play.

GOAL AND OBJECTIVES 2.1: TRAILS AND OPEN SPACE RECREATION AREAS

- a) Provide an abundance of opportunities for self-directed leisure and passive recreation through an extensive system of well-maintained trails, bike paths, nature areas and accessible open space.
- b) Provide signage and facilities to educate users about way-finding, safety and to maintain trail cleanliness.

GOAL AND OBJECTIVES 2.2: MAINTAIN & OPERATE HIGH QUALITY PUBLIC & PRIVATE RECREATION AMENITIES

- a) Tahoe Donner develops, maintains & operates a wide variety of amenities and recreation facilities that operate both year-round and seasonally to serve both homeowners, guests and visitors.
- b) Optimize use, cost recovery and visitor satisfaction of amenities and facilities through scheduling, staffing, and amenity access and fee policies.

GOAL AND OBJECTIVES 2.3: DEVELOP AMENITY ACCESS & PRICING POLICIES

- a) A cost of service and fee study is conducted to determine the cost of operation and the current level subsidy from homeowner assessments versus user fees and cost effectiveness of each program and amenity operated.
- b) Amenity access and pricing policies are developed and implemented to ensure fair, appropriate and cost-effective utilization of Tahoe Donner amenities and programs through combination of user fees and operational subsidies from annual homeowner assessments.
- c) Member feedback and level of support on proposed changes to amenity access and pricing policies are garnered through a comprehensive outreach process prior to adoption by the Board.

GOAL AND OBJECTIVES 2.4: PLAN AND IMPLEMENT A VARIETY OF RECREATION PROGRAMS, SERVICES & EVENTS

- a) Develop recreational and leisure programs with effective pricing and marketing strategies that drive value, attendance and cost recovery.
- b) Ensure an adequate number of highly trained full and part time employees to supervise and programs.

STRATEGIC INITIATIVE #3: HIGH PERFORMING & FISCALLY RESPONSIBLE ORGANIZATION

Outcome: Tahoe Donner achieves a high level of member satisfaction and is governed and managed in an efficient and effective manner that maximizes return on investment from annual assessments & earned income.

GOAL AND OBJECTIVES 3.1: FISCAL RESPONSIBILITY

- a) A balanced budget that adequately funds Association programs, services, amenities and facility operations at appropriate and acceptable levels to the homeowners is developed, adopted and maintained through a prudent combination of user fees, special capital funds and homeowner assessments.
- b) Adequate reserves are maintained to ensure the long-term fiscal health of the association and to address emergencies and economic fluctuations that affect the budget.
- c) A comprehensive 10-year capital plan and funding strategy is developed that meets the needs of our homeowner priorities and desires.
- d) Develop amenity business plans and new operational strategies to lower expenses, increase revenue and optimize utilization of under-performing lines of service.
- e) Maintain homeowner's trust through timely dissemination of information, opportunities for member engagement and transparency and accountability with the budget and all significant fiscal matters.

GOAL AND OBJECTIVES 3.2: WORKFORCE ATTRACTION & ORGANIZATIONAL DEVELOPMENT

- a) Attract, develop and retain a capable and diverse workforce to manage, maintain and operate Tahoe Donner.
- b) Assess the current organizational structure and staffing plan relative to capability, efficiency & effectiveness and redesign, right-size and optimize the framework for operations as warranted.

GOAL AND OBJECTIVES 3.3: EMPLOYEE TRAINING AND SUCCESSION PLANNING

- a) Create and implement an employee succession plan to identify critical positions and grow core competencies necessary for management and operations.
- b) Grow talent through organizational development & training to meet the current and future needs of Tahoe Donner.
- c) Provide a comprehensive and consistent on-boarding orientation process for new employees and an ongoing training program for employees at all levels to develop the technical and people skills required for all positions.
- d) Develop and implement a supervisor and manager academy.

STRATEGIC INITIATIVE #3: HIGH PERFORMING & FISCALLY RESPONSIBLE ORGANIZATION

Outcome: Tahoe Donner achieves a high level of member satisfaction and is governed and managed in an efficient and effective manner that maximizes return on investment from annual assessments & earned income.

GOAL AND OBJECTIVES 3.4: GOVERNANCE

- a) Review and update the Strategic Plan's goals and action plans annually as necessary & appropriate.
- b) Align the budget annually with the adopted Strategic Plan and with Board & Management goals & priorities.
- c) Evaluate and facilitate Board and Committee development and governance effectiveness by providing education and training opportunities, as well as orientation for new members.
- d) Assess and update Committee charters as appropriate to best meet the ongoing needs of the Association.
- e) Monitor and influence legislation and regulations that effect Tahoe Donner, and advocate for the interests of the Association at the local, state or federal level as warranted.

GOAL AND OBJECTIVES 3.5: TECHNOLOGY

- a) Collect & leverage data and technology to guide decisions, improve results, and enhance service delivery.
- b) Technology tools and system software that improve efficiency and effectiveness are expanded, enhanced and implemented to support the internal and external user interface and experience with TD's services & amenities.
- c) Implement a computerized maintenance management system (CMMS) to maintain inventory and condition of Association assets.

STRATEGIC INITIATIVE #4: ENVIRONMENTAL STEWARDSHIP

Outcome: Tahoe Donner provides responsible stewardship of the community's natural resources and responsible lands management of its 5,000 acres of open space.

GOAL AND OBJECTIVES 4.1: MASTER PLAN & INVEST IN PRIORITY RESTORATION PROJECTS & HABITAT CONSERVATION

- a) Develop a comprehensive land use masterplan that incorporates updated plans for forestry, trails & open space.
- b) Develop a 10-year Open-Space & Trails Management, Restoration and Project Management Plan, implement approved projects annually, and monitor adherence and compliance with the Plan.
- c) Capital investments and improvements are made annually in support of trails, habitat restoration, natural resource preservation and mitigation of environmental hazards.
- d) Coordinate overall land management operation by integrating the recreational and non-recreational portions of open space.
- e) Identify and implement organizational green initiatives to reduce Tahoe Donner's carbon footprint.

GOAL AND OBJECTIVES 4.2: MANAGING USE & ENVIRONMENTAL IMPACTS

- a) Effectively manage the increasing and changing use of the natural and developed assets within Tahoe Donner while both protecting those assets and providing visitors with a quality experience.
- b) Prepare for the impacts of climate change and seasonal weather changes that can affect operations and the health of the Tahoe Donner's natural resources.
- c) Foster public understanding and appreciation of the need to preserve and protect Tahoe Donner's natural resources and influence responsible environmental stewardship through education, signage, use regulations and policies.
- d) Facilitate CERS/CUPA training and plan with Truckee Fire and other regulatory agencies for addressing & handling hazardous materials.

INITIATIVE #5: PLANNING, DEVELOPMENT & INFRASTRUCTURE

Outcome: Tahoe Donner plans, develops and maintains Association owned land, infrastructure and recreation amenities that meet homeowner needs & ensures quality home building & upkeep through covenants & architectural standards.

GOAL AND OBJECTIVES 5.1: DEVELOP A LONG-TERM CAPITAL IMPROVEMENT & REPLACEMENT PLAN INCLUDING FUNDING STRATEGY

- a) Develop a comprehensive needs analysis, feasibility studies and conceptual plans to expand and/or enhance aging facilities, amenities and infrastructure.
- b) Identify and implement a prioritized facility and infrastructure assessment, rehabilitation and replacement plan with associated cost estimates and timeline for improvements.
- c) Allocate replacement reserve and development funds with annual budget process to complete approved projects.
- d) Develop a 10-year funding strategy and financial plan for investment and reinvestment as needed and desired for capital improvements utilizing all funding sources as appropriate and available.

GOAL AND OBJECTIVES 5.2: FACILITY & INFRASTRUCTURE PLANNING

- a) Develop a comprehensive inventory, assessment and masterplan for infrastructure and facilities.
- b) Ensure new capital improvement projects address the preservation of the health and sustainability of Tahoe Donner's natural resources, forests, wetlands and wildlife.
- c) Work with Town of Truckee to advocate for a third roadway access & egress from Tahoe Donner to enhance circulation, transportation and safety.
- d) Collaborate & advocate with local responsible agencies to influence internet service, roadway, utilities and alternative transportation.

GOAL AND OBJECTIVES 5.3: COVENANTS AND ARCHITECTURAL STANDARDS

- a) Educate, facilitate, regulate and enforce Tahoe Donner's covenants and architectural standards to maintain a consistent and harmonious community and preserve the aesthetic quality & property values within Tahoe Donner.
- b) Preserve the character of Tahoe Donner through services, enforcement of minimum standards, compliance with C&R's and encouraging enhancements to properties to maintain community attractiveness.
- c) Update Tahoe Donner's Covenants and Restrictions to align with Davis-Stirling and other best practices.

STRATEGIC INITIATIVE #6: CREATE AN INFORMED, ENGAGED & LIVABLE COMMUNITY

Outcome: Homeowners are informed and are involved in creating & sustaining a vibrant and livable community.

GOAL AND OBJECTIVES 6.1: UNDERSTAND, RESPOND AND ADAPT TO HOMEOWNER NEEDS & INDUSTRY TRENDS

- a) Conduct member surveys and other feedback efforts to better understand member utilization, satisfaction, needs and priorities for programs, services and amenities
- b) Identify homeowner priorities and level of support for funding proposed budget priorities through homeowner assessments.
- c) Member and guest satisfaction regarding amenities and services is measured through real-time leading indicators via Likemoji and Zendesk reviews and data is analyzed and utilized to improve services.
- d) Benchmark operational practices, measurements & metrics against comparable industry standards and practices.
- e) Development and operation of amenities, leisure programs and homeowner services are adapted in response to leisure trends, changing demographics and member needs & priorities.

GOAL AND OBJECTIVES 6.2: HOMEOWNER COMMUNICATION AND ENGAGEMENT

- a) Develop and implement a comprehensive communications plan.
- b) Encourage member engagement and participation in the governance and decision-making affecting Tahoe Donner through education, timely notification and opportunities to participate in meetings.
- c) Expand and enhance transparency and member education in the annual budget process and with important decisions affecting homeowners and the operation of Tahoe Donner.

GOAL AND OBJECTIVES 6.3: FOSTER COMMUNITY PRIDE AND SENSE OF PLACE

- a) Foster meaningful relationships between our members, our employees and our places and spaces through special events, networking opportunities and other programs.
- b) Develop and implement a strategy to strengthen and promote the Tahoe Donner brand as a special community with exceptional quality of life, livability and sense of place.

GOAL AND OBJECTIVES 6.4: MARKETING AND COMMUNICATIONS

- a) Provide timely and relevant communication to the members and public through a variety of media sources to meet legal requirements and to foster understanding, appreciation and utilization of Tahoe Donner's programs, services and amenities.
- b) Develop sponsorships and advertising opportunities to offset operating costs of programs and publications

FEEDBACK?



TAHOE DONNERSM

STRATEGIC PLAN NEXT STEPS

- Update and Finalize Strategic Plan
- Strategic Plan Workshop #2: November 5, 2020
- Once Approved, We'll Use as the Guide for Managing and Operating the Association
- Develop Measurements and Metrics for Goals and Objectives
- Update and Affirm Annual Goals Based on 5-year Strategic Plan