



## 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 is 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



# Tahoe Donner Strategic Plan Initiatives



## INITIATIVE #1: 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.



## INITIATIVE #2: RECREATION OPPORTUNITIES

Homeowners and visitors benefit from a variety of private and public 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 achieves a high level of member satisfaction and is governed and managed in an efficient and cost-effective manner that provides owner's a good value from annual assessments and user fees.



## INITIATIVE #4: ENVIRONMENTAL STEWARDSHIP

Tahoe Donner provides responsible stewardship and sustainable lands management of its 7,000+ acres of developed property, open space and natural resources.



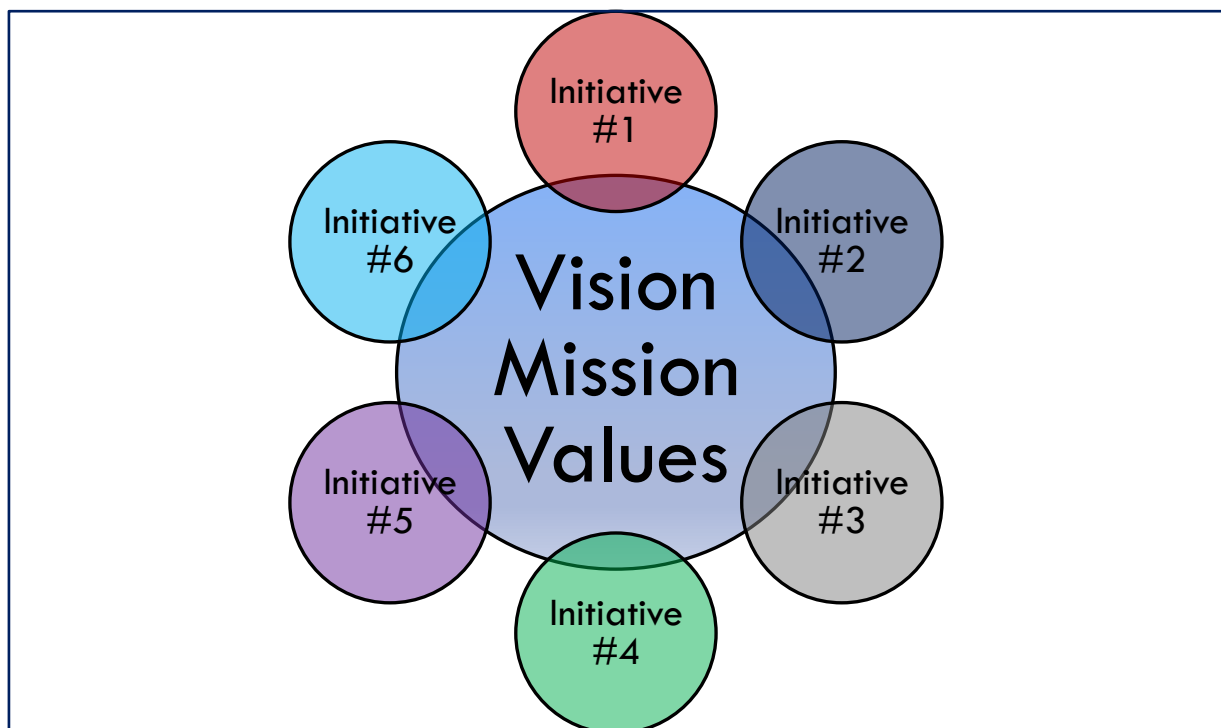
## INITIATIVE #5: PLANNING, DEVELOPMENT AND INFRASTRUCTURE

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 involved in creating a vibrant and livable community.



## INITIATIVE #1. SAFE COMMUNITY

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

### GOAL 1.1: HOMEOWNERS ARE EDUCATED AND ADHERE TO GOOD PRACTICES IN FIRE PREVENTION AND PUBLIC SAFETY

#### Objectives

- a) Homeowners and employees are educated about fire prevention, emergency preparedness & response and evacuation routes.
- b) Homeowners and the Association minimizes and mitigates the potential for wild fire through compliance with Tahoe Donner's defensible space program.
- c) Homeowners are educated about fire and public safety regulations and practices affecting Tahoe Donner through newsletters and outreach efforts in partnership with local public safety agencies.



### GOAL 1.2: FIRE PREVENTION, PUBLIC SAFETY, EMERGENCY PREPAREDNESS AND INTERAGENCY SERVICES ARE PROMOTED AND ACHIEVED WITHIN THE COMMUNITY

#### Objectives

- a) Satisfactory levels of public health and safety, emergency response, fire hazard reduction and crime prevention are achieved through communication and advocacy with the Truckee Police Department, Truckee Fire Protection District, Nevada County Sherriff's Office and other agencies responsible for public safety.
- b) Alert and warning measures are identified, improved and implemented in partnership with local public safety and land use agencies.
- c) Safe and operable conditions of Tahoe Donner's infrastructure, facilities and trails are ensured through development, maintenance, operational practice and inspection.
- d) Tahoe Donner staff are trained on accident prevention, emergency action plans and activities and are supervised and operated in a manner consistent with best practices in safety and risk management.
- e) Public health and safety-mitigation measures are implemented and complied with per State and local regulations



## INITIATIVE #2. RECREATION OPPORTUNITIES

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

### GOAL 2.1: OPEN SPACE AND TRAIL RECREATION AREAS ARE PROVIDED THAT MEET THE NEEDS OF MEMBERS

#### Objectives

- a) Opportunities for self-directed recreation are provided through an extensive system of well-maintained trails, bike paths, natural areas and accessible open space.
- b) Tahoe Donner's trails and open space system has been expanded and enhanced through a Trails and Open Space Master Plan.
- c) Signage and facilities to educate users about wayfinding, safety and to trail cleanliness are provided.



### GOAL 2.2: HIGH-QUALITY RECREATION AMENITIES AND PROGRAMS ARE WELL-MAINTAINED, OPERATED AND UTILIZED

#### Objectives

- a) Tahoe Donner develops, maintains and operates a wide variety of amenities that operate both year-round and seasonally to serve homeowners, guests and visitors.
- b) Amenity utilization, cost recovery and user satisfaction of amenities and facilities are optimized through scheduling, staffing and amenity access and fee policies.
- c) A variety of recreation programs are planned and implemented with effective pricing and marketing strategies that drive participant value, attendance and cost recovery.
- d) Overcrowding at amenities is addressed and mitigated through a combination of scheduling, reservation systems, pricing and amenity access policies.

### GOAL 2.3: ACCESS AND PRICING POLICIES ARE DEVELOPED FOR AMENITIES AND PROGRAMS

#### Objectives

- a) A cost-of-service and fee study is conducted and analyzed to determine the cost of operation and cost-effectiveness of each program and amenity operated.
- b) Amenity access and pricing policies are developed and implemented to ensure equitable, appropriate and cost-effective utilization of Tahoe Donner amenities and programs through the combination of user fees and operational subsidies from annual homeowner assessments.

## STRATEGIC INITIATIVE #3. HIGH-PERFORMING & FISCALLY RESPONSIBLE ORGANIZATION

*Tahoe Donner achieves a high level of member satisfaction and is governed and managed in an efficient and cost-effective manner that protects homeowner's investment and provides members a good value from Association owned assets, annual assessments and user fees.*

### GOAL 3.1: EXERCISE FISCAL RESPONSIBILITY AND TRANSPARENCY

#### Objectives

- 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 and annual homeowner assessments.
- Adequate reserves are maintained to ensure the long-term fiscal health of the association and address emergencies and economic fluctuations that affect the budget.
- Transparency in the annual budget process and with important decisions affecting homeowners and the operation of Tahoe Donner is ensured through timely communication and homeowner engagement.
- A long term financial plan for the Association is developed that forecasts future ongoing operational and capital expenses with projected revenues from annual assessments and user fees, as well as anticipating growth and impacts from new residential development.
- Business plans and new operational strategies are developed as warranted to improve cost-effectiveness, optimize utilization and achieve a high level of user satisfaction with amenities and services.



### GOAL 3.2: CULTIVATE AN EFFECTIVE AND DYNAMIC WORKFORCE

#### Objectives

- A capable and diverse workforce to manage, maintain and operate Tahoe Donner is attracted, developed and retained.
- The Association's organizational structure and staffing plan is assessed and evaluated relative to capability, efficiency and effectiveness.
- Employee talent and core competencies are grown to meet the current and future needs of Tahoe Donner through organizational development, training and succession planning.

### GOAL 3.3: ADHERE TO GOOD GOVERNANCE AND MANAGEMENT PRINCIPLES AND PRACTICES

#### Objectives

- The Association's annual budget is aligned with the adopted Strategic Plan and with annual work program goals and action plans as necessary and appropriate.
- Board and Committee development and governance effectiveness is evaluated and improved by providing education and training opportunities.
- Committee charters are updated as appropriate to best meet the ongoing needs of the Association and the Board.
- Board and staff will monitor and influence legislation and regulations that affect Tahoe Donner and advocate for the interests of the Association at the local, state or federal level as warranted.
- Association governing documents are updated to comply with the Davis-Stirling Act and other laws and regulations.
- Tahoe Donner maintains effective interagency relationships with the Truckee Donner Public Utility District, Town of Truckee, Truckee Donner Land Trust, Regional Water Quality Control Board, US Forest Service, California Department of Fish and Wildlife, Mountain Housing Council and neighboring landowners to maintain consistent services for the community.
- Update Association governing documents as needed to comply with Federal & State laws and to adhere to established best practices in Homeowner Association Management.

### GOAL 3.4: UTILIZE TECHNOLOGY TO ENHANCE EFFECTIVENESS AND EFFICIENCY

#### Objectives

- Technology tools and system software are expanded, enhanced and implemented to support the user experience with Tahoe Donner's services and amenities. and improve efficiency and effectiveness.
- Data is utilized and leveraged to better understand homeowner and guest interactions with Tahoe Donner and to guide decisions, improve results and enhance service delivery.

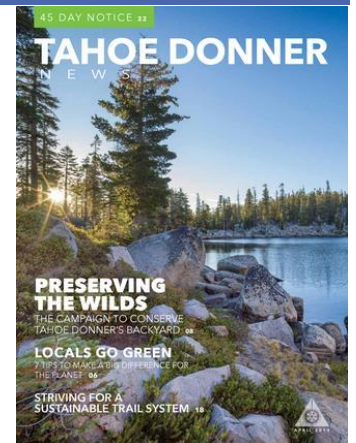
## STRATEGIC INITIATIVE #4. ENVIRONMENTAL STEWARDSHIP

*Tahoe Donner practices responsible stewardship and sustainable lands management of its 7,000+ acres of developed property, open space and natural resources.*

### GOAL 4.1: DEVELOP A COMPREHENSIVE LAND USE MASTER PLAN AND MAINTENANCE MANAGEMENT PLANS

#### Objectives

- a) A 10-year master plan for land management is developed and implemented by integrating the developed and undeveloped portions of Association-owned lands.
- b) Maintenance management plans for fire prevention & safety, forestry, trails, greenbelts, common areas and open space that are developed and implemented.
- c) Investments and improvements are made in support of trails, habitat restoration, natural resource preservation and mitigation of environmental hazards as well as to monitor compliance with permits and regulations.



### GOAL 4.2: MANAGING USE AND ENVIRONMENTAL IMPACTS

#### Objectives

- a) The growing and changing use of Tahoe Donner's open space is effectively managed by protecting those areas and providing members with a quality experience.
- b) Tahoe Donner is prepared for and effectively adapts to the impacts of climate change and seasonal weather changes that can affect operations and the health of Tahoe Donner's natural resources.
- c) Sustainable initiatives to reduce the Association's carbon footprint are identified and implemented.
- d) Public understanding and appreciation of the need to preserve and protect Tahoe Donner's natural resources is fostered, and public behavior is influenced towards responsible environmental stewardship through education, signage, use regulations and policies.

## INITIATIVE #5. PLANNING, DEVELOPMENT AND INFRASTRUCTURE

*Tahoe Donner plans, develops and maintains Association-owned land, infrastructure and recreation amenities that meet homeowner expectations and the Association's needs. Tahoe Donner ensures quality home building and upkeep through its covenants and architectural standards.*



### GOAL 5.1: COMPLETE DEVELOPMENT OF A LONG-TERM CAPITAL IMPROVEMENT AND REPLACEMENT PLAN WITH FUNDING STRATEGY

#### Objectives

- a) Homeowner & Association needs, desires, use and priorities for amenities are solicited and responded to in relation to capital improvement investment and reinvestment.
- b) Comprehensive needs analysis, feasibility studies and conceptual plans to expand and/or enhance existing facilities, amenities and infrastructure are developed and analyzed to guide capital improvement decisions.
- c) A facility and infrastructure assessment, rehabilitation and replacement plan with associated cost estimates and timeline for improvements is developed, prioritized and implemented.
- d) A long-term funding strategy and financial plan for capital improvement investment and reinvestment is developed and implemented.



### GOAL 5.2: ENSURE RESPONSIBLE PLANNING AND DEVELOPMENT

#### Objectives

- a) Approved capital improvement projects are planned and completed on time and on budget.
- b) Planning and development within Tahoe Donner will address the preservation, health and sustainability of natural resources, forests, wetlands and wildlife and adhere to the California Environmental Quality Act (CEQA), environmental laws and other regulations.
- c) The Association works and advocates for a third roadway access and egress from Tahoe Donner to enhance circulation, transportation and safety with the Town of Truckee and other responsible agencies.
- d) Improved internet service, utilities and transportation are advocated for and influenced by the Association.
- e) Best practices in sustainable design and construction are researched and implemented in relation to furthering energy conservation, mitigating environmental impacts and reducing the carbon footprint of ongoing operations.

### GOAL 5.3: ENSURE COMPLIANCE WITH COVENANTS, RESTRICTIONS AND ARCHITECTURAL STANDARDS

#### Objectives

- a) Tahoe Donner's covenants and architectural standards are maintained to ensure consistent home development that preserves the aesthetic quality and property values within Tahoe Donner.
- b) Preserve the character of Tahoe Donner through education, owner services and enforcement of minimum standards that achieve compliance with C&Rs.
- c) Update Tahoe Donner's Covenants and Restrictions to align with the Davis-Stirling Act and other best practices.

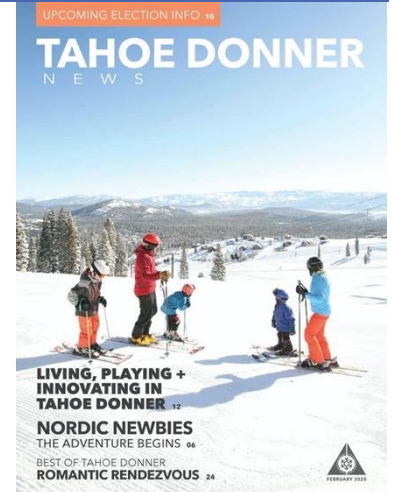
## STRATEGIC INITIATIVE #6. CREATE AN INFORMED, ENGAGED AND LIVABLE COMMUNITY

*Homeowners are informed and engaged in creating a vibrant and livable community.*

### GOAL 6.1 UNDERSTAND AND RESPOND TO OUR HOMEOWNERS & CUSTOMERS

#### Objectives

- a) Understand homeowners and help them feel connected to Tahoe Donner and its amenities, programs & services.
- b) Gather new and existing data on homeowner and user demographics to better serve our core customer.
- c) Member surveys and other real-time leading feedback indicators are conducted and analyzed to improve services and better understand member utilization, satisfaction, needs, priorities and barriers to access and participation
- d) Use innovative processes and mechanisms to foster dynamic programs and engaging services
- e) Development and operation of amenities, recreation programs and homeowner services are adapted and evolved in response to leisure & industry trends, changing demographics and member/association needs and priorities.



### GOAL 6.2: ENHANCE MEMBER SATISFACTION THROUGH TIMELY AND EFFECTIVE COMMUNICATION, OUTREACH & ENGAGEMENT

#### Objectives

- a) A comprehensive communications plan that ensures timely and relevant communication to members and visitors that meets legal requirements and fosters understanding, appreciation and utilization of Tahoe Donner's programs, services and amenities is developed and implemented.
- b) Member engagement and participation in Tahoe Donner governance and decision-making is supported through education, timely notification and opportunities to participate in Board and Committee meetings and workshops.
- c) Member enjoyment and a sense of community are fostered in our homeowners, our employees and our places and spaces through special events, networking opportunities and other programs.
- d) Develop and implement a strategy to strengthen and promote the "Tahoe Donner Brand" as a special mountain community with exceptional quality of life, recreation opportunities, livability and strong sense of place.
- e) Operational practices are benchmarked against current comparable industry standards and best practices.
- f) Sponsorships and advertising opportunities are implemented to offset operating costs of programs and publications.



# GLOSSARY OF STRATEGIC PLAN TERMS

## ELEMENTS OF THE STRATEGIC PLAN

**Vision Statement:** States what Tahoe Donner wants to achieve and where it wants to be in the future in an aspirational and forward-thinking manner.

**Mission Statement:** Defines why Tahoe Donner uniquely exists, what it does and why it is important. The mission explains Tahoe Donner's plan for the present based on what it wants to achieve.

**Values:** Explains Tahoe Donner's core principles and philosophical ideals. Values inform and guide the decisions and behaviors of the people inside the organization and signal to homeowners and external stakeholders what is important to the Association.

**Strategic Plan:** The road map to guides Tahoe Donner towards accomplishing its vision and plans to follow in the successful operation, maintenance and development of the Association's lands, amenities, facilities, programs and services.



**Goals:** Affects what homeowners want as a result of the Association's operations, programs and activities.

**Strategic Initiatives:** Explains the distinct and interdependent areas of governance, management and operations that comprise the means through which Tahoe Donner transforms its vision into practice.

**Objectives:** Observes and measures effect on members, customers, the environment or infrastructure that provides objective evaluation of accomplishment of goals and objectives.

**Tactics & Action plans:** Are the Association's work programs, action plans and operational approaches to accomplishing its goals and objectives. Action plans may include Annual Goals & Corresponding Work Programs.

**Performance Measures:** Demonstrates through quantitative values how effectively the organization is achieving its goals and objectives. Performance measures may include key performance indicators at multiple levels to evaluate success in reaching target metrics or accomplishing an expected result.

## OTHER TERMS

**Business Plan:** A business plan is a written document that describes in detail how the Tahoe Donner organization or component line of service (i.e. Food & Beverage, Golf, Marina, Recreation Center) defines its objectives and how it is to go about achieving its goals. A business plan lays out a written roadmap for the organization or component line of service to achieve success from the standpoints of [marketing](#), customer utilization, customer satisfaction, financial, and achieving operational performance standards.

**Board Annual Goals:** Annual goals and work programs, specific in nature and have performance measure written into the annual budget as goals and objectives. Objectives in the annual goals should reflect and support the intent of the goals and objectives in the 5-Year Strategic Plan.

**Covenants & Restrictions (C&Rs):** Covenants and Restrictions are the limits and rules placed on homeowners by the Tahoe Donner Homeowner Association. They govern what you can, can't, or must do with respect to your home.

**Davis Stirling:** Is the popular name of the portion of the Davis–Stirling Common Interest Development Act, the [California Civil Code](#) beginning with section 4000,<sup>[1]</sup> which governs [condominium](#), [cooperative](#), and [planned unit development](#) communities in California. It was authored by Assemblyman Lawrence W. "Larry" Stirling and enacted in

1985 by the [California State Legislature](#). In 2012, the Act was comprehensively reorganized and recodified by Assembly Bill 805.<sup>12</sup>

**Financial Plan:** Is the Plan of how the Association will afford to achieve its strategic goals and objectives. The [Financial Plan](#) describes each of the activities, resources, equipment and materials that are needed to achieve these objectives, as well as the timeframes involved.

### **Governance**

Governance is the [system of rules, practices, and processes](#) by which the Tahoe Donner Homeowner Association is directed and controlled by its elected Board of Directors. Governance essentially involves balancing the interests of the Association's owners (AKA Homeowners), senior management, customers, partners and the community. Because governance provides the framework for attaining the Association's vision, mission, goals and objectives, it encompasses practically every sphere of management, from action plans, fiduciary responsibilities, [internal controls](#) to performance measurement.

**Governing Documents:** Is a collective term that means this Declaration and the Articles, Bylaws and Association Rules, as the same may be amended from time to time.

**Stewardship:** The responsible oversight and protection of something considered worth caring for and preserving. Stewardship is also an ethic that embodies the responsible planning and management of resources. The concepts of stewardship can be applied to the environment and nature, economics, health, property, information, theology, cultural resources etc.

**Sustainability:** Sustainability is the capacity to endure and the ability to be maintained at a certain desired rate or level. Sustainability also means meeting the current needs of the Association's without compromising the ability to meet those needs in the future. In addition to environmental sustainability of natural resources, sustainability can also relate to social, financial, economic and other limited resources.