

2024 ANNUAL STRATEGIC OBJECTIVES YEAREND REPORTING - DRAFT

Objective Focus Area	Strategic Plan Initiative + Goal	Objective	Description	Measurements + Metrics	Measurements + Metrics Q1 + Q2 Reporting	Measurements + Metrics Year-End Reporting (Q1-4)	Status
A. Amenity Access Improvement	2.3	1. Amenity Access Policy Update	The Amenity Access policy is updated to improve the member experience through a robust board and member engagement process culminating in the rule-making notification process and adoption of the updated policy.  A transition plan for implementing the updated policy is developed in the first half of 2024 and will include an education plan, budget impacts, and an identified period for sunseting the current policy.	Adoption of updated Amenity Access Policy  Transition plan objectives and milestones  Communication open and click-through rates	Draft policy at 90%  Draft policy includes Transition Plan objectives and milestones  Communication open and click-through rates Amenity Access Emails -April Meeting email: open rate 61.3% (6,591), 1.7% clicks (179) -Feb Meeting email: open rate 64.5% (6,990), 1.8% clicks (197) -Jan Meeting email: open rate 63.4% (6,732), 2.3% clicks (239) -Dec Meeting email: open rate 64.5% (6,847), 1.5% clicks (164)	45-day notice approved on August 15. Board updated on comments midway through the comment period then again after the 45-day notice period ended. The rule and Implementation Plan was adopted on October 10, 2025. The approval triggered the Communication Plan, which continues evolving as opportunities exist. Created and Launched a new Payment Platform  The communication plan included launching the web hub within the week of approval, developing processes and documenting both how-to for the members and how-to for the staff, a dedicated STR campaign to both owners and property managers, staff training, and a what-to-know-in-2025 campaign for January. Extensive communication for the payment portal and monthly TD News stories are also included.  Communication open and click-through rates Amenity Access Emails: - August Amenity Access: open rate 69.6% (7,392), 2.9% clicks (304) - 45 Notice Meeting: open rate 66.5% (7,086), 10.7% clicks (1,141) - Pres Message Amenity Access: 67.7% (7,137), 3.2% clicks (341) - STR-Only Dedicated Education: 83.8% (614), 17.5% clicks (128)	Completion in 2024, Ongoing implementation for 2025 and beyond
B. Member Value + Strengthening Community	6.1 & 6.2	1. Member Relations + Engagement	Increase member value, trust, and awareness by completing an analysis of feedback from the 2023 Member Survey (to be completed in Q4 2023) to understand the members better, identify areas of improvement and opportunities to increase value and member satisfaction, and adapt and evolve programs and services. Build and implement the member value programming plan for 2024.	Plan objectives for engagement and value for 2024 in partnership with a variety of amenities and F+B outlets  KPIs •HappyOrNot + Zendesk Customer Satisfaction Scores •Member Utilization, where trackable •%/# of member discounts and special opportunities •Communication open and click-through rates •% of survey respondents	Completed and presented to the Board at the April 26, 2024, board meeting. 2024 plans included returning or creating many new initiatives, including adding member value callouts in the Summer Fun Guide, Weekly Activity Guide and website, returning Wibbit, movie nights and extended F+B hours on Friday and Saturday at the pool. Ongoing efficiencies and long-term solutions are being implemented and developed.  KPIs •Zendesk Q1+2 2023 increased from 96.4% satisfaction to 97.8% in the same period for 2024 (86% is Zendesk average satisfaction) • HappyOrNot: Q1+2 scores are flat in F+B from year over year, 1 point increase for amenities •BOGO (Lodge and Pizza) increased from 332 to 474 total uses from Fall to Spring •Member Email Communication: 420,363 total sends (42 member-specific emails in 6 months), 63% open rate, 2.3% clicks .06% unsubscribe rate (very strong stats) •Surveys: 35 responses to Forestry post-event survey, Summer Concert post-event survey 297 responses (after 4 days) and a Net Promotor score of 71 (great!)	1.Work with Finn Group to build and coordinate the survey report out and facilitate any secondary analysis a.B1: completed analysis with Finn group and helped develop the presentation for the board b.B2: additional analysis was completed and presented to the board at 2 meetings regarding diminishing member value c.B3: a staff analysis of open-ended feedback and programming ideas (immediate and long-term ideas). Implementation included Wibbit, Movie Night, Return of Kids Club, Member Only Parking at Marina, branding quarterly "Member Happy Hour", etc d.B4: Reported metrics/KPIs for board report 2.Provide additional reporting on Food + Bev feedback a.B5: open-ended feedback was simplified to only show feedback pertaining to F+B in Q2. In Q4 an in-depth analysis was created and presented to the F+B leadership team and provided a variety of suggestions, including the request to investigate the viability of a member discount, menu ideas, etc. 3.B6: take suggestions and work with the Directors to implement a 2024 services and programming additions/changes a.B7: Complete. See #1.c above. Additional implements needed for into 2025 4.B8: Lead the budgeting, programming and implementation of both a winter and summer music series a.B9: More than 42 music performances in 2024. Post-event surveys put out. Feedback was great – members love our live music series. This initiative came in under budget by about \$5k (spent \$17k of 22k) and generated \$13k in advertising revenue (10k after commission) for the summer music series (not including special event sponsorship). 5.B10: Implement a Comdep member value education campaign a.B11: Comdep implemented a member value key for all amenities on the web, in the Summer Fun Guide, and in Weekly/Holiday Activity Guides. Phase 2 of creating a one-sheeter is being implemented in Q1 of 2025 and a new Owner Benefit and Member Benefit graphic was implemented in the 2025 Budget Report. 6.B12: Implement phase 2 of a new member welcome initiative in the Member Services Office a.B13: high-quality RTIC tumbler and coffee mug was budgeted, ordered and implemented to provide to all new homeowners in 2024 and is continuing into 2025. This allows us to welcome all new homeowners on a positive note. This followed the 2023 phase 1 initiative to provide a welcome video and streamline the welcome process by developing intake forms to speed up the process and allow staff to focus on education and less on receiving and processing information. Investigating a new member welcome event currently.	Completion in 2024, Ongoing implementation for 2025 and beyond
	1.1; 1.2; 4.1; 4.2; & 4.6	2. Stewardship	The Land Management team expands and enhances community involvement, education, and partnerships to increase the level of public trust and keep the community safe.	A membership land management education series and other engagement events objectives: increase awareness of fire safety, and understanding of the commitment and actions Tahoe Donner takes to steward its lands  KPIs •% of members attending who report likely to attend another event •% of member satisfaction •% of members likely to refer others to the events •Growth rate of attendance	Reporting on KPIs- •February, hosted CWPP community feedback meeting at Lodge. 20 participants, 7 employees, 5 external agency representatives. •March 23, guided tree identification snowshoe tour at ACAC, 9 participants, 3 employees. •April 4, hosted new defensible space webinar, 60-70 participants, 5 employees. •May 2, hosted defensible space webinar for contractors operating in TD, TFPD collaboration, 5 employees. •May 8 Eastern Regional fire coalition meeting. 40 participants, 1 employee. •May 31, Hosted Community green waste drop off day at Trout Creek, TFPD collaboration, 150 piles collected, 5 employees. •May 29, Hosted real estate defensible space webinar, TFPD collaboration. 4 employees. •June 7, Ben Gwerder presented TD forestry program operations at regional quarterly wildfire stakeholder meeting at airport. 40 agency, stakeholder partners. June 20th, stewardship day, Hawks peak, heavy brushing, 7 participants, 5 employees. June 30th, booth at Annual member BBQ, 1 employee. •June 28 Guided Wildflower tour in Euer Valley, 15 participants. •July 2, Forestry project tour (USFS Alder project), 8 participants, 2 employees. •July 11, cancelled stewardship day due to excessive heat.	•# of events hosted in 2024 - 18 events, 2023 hosted 9 events, growth rate -100%. 2 events canceled due to weather conditions. • The total number of participants in 2024 was 434. In 2023, there were 76 attendees, and the attendee growth rate from 2023 to 2024 was 471%. Due to the significant growth rate of attendees, the accurate member satisfaction KPI is missing.  August 1st, Trail Stewardship Day, EQ, wildwest reroute. August 8th, Forestry project tour, ACAC, wildwest area. August 15th, Stewardship Day, Nature Loop. August 23rd, Forestry thinning project tour, Glacier Way. August 31st, Coyote Crossing project tour scheduled (likely postpone for project implementation)	Completed

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	1.1; 1.2	3. Fire Defensibility + Forest Health	Homeowners and the Association minimize and mitigate the potential for wildfire through compliance with Tahoe Donner's defensible space program and enhanced forest management.	<p>KPIs</p> <ul style="list-style-type: none"> <li>•% of private property compliance in the defensible space program</li> <li>•# of acres of Common Area treated for defensible space</li> <li>•# of strategic acres (TDA-owned and adjacent property) for vegetation management</li> <li>•# of acres of TDA high-hazard areas identified in the Truckee Fire Protection District CWPP</li> <li>•Tons of green waste are removed from TDA annually</li> <li>•# of dead trees removed from TD-owned property annually</li> </ul>	<p>KPIs</p> <ul style="list-style-type: none"> <li>•% of private property compliance in the defensible space program - all 969 properties inspected for 2024 6 yr Defensible space cycle early July, on track. 23% compliant as of July, on track. 149 real estate inspections, 66 compliant. Other out-of-cycle requested inspections 66, 16 compliant. total 2024 inspections of 1,131 properties, 385 in-person meetings with homeowners, 37% of all properties</li> <li>•# of acres of Common Area treated for defensible space - 30 acres common area full fuel reduction as of July + priority hazard, dead tree removal across the common area, amenities. Other Association-owned parcels have 50 acres of treatment as of July.</li> <li>•# of strategic acres (TDA-owned and adjacent property) for vegetation management - 0 as of July, USFS Alder project has been awarded, planned for late 2024, 2025-7 implementation. currently laying out grant 2024 grant funded projects on southwest parcels, late 2024,2025 implementation</li> <li>•# of acres of TDA high-hazard areas identified in the Truckee Fire Protection District CWPP, in the project layout phase</li> </ul>	<ul style="list-style-type: none"> <li>• % of private property compliance 99.8%. One home referred to Covenants Committee at yearend</li> <li>• # of acres of common area treated for defensible space 140 acres</li> <li>• # of Open Space strategic acres treated 193 acres</li> <li>• # of acres of TDA high hazard areas identified in the Truckee Fire CWPP - 333 acres.</li> <li>• Tons of green waste removed from TDA annually - 1,170 Bone dry tons (73 semi truck loads of ground material) 2023 to 2024 growth rate +10.37%.</li> <li>• # of dead trees removed from TD owned property annually 2024 =1876 trees &gt; 8". 2023 = 1216 trees. 23 -24 growth rate = 54%</li> </ul>	Completed
C. Planning, Development + Infrastructure	3.1; 3.3; 5.1	1. Capital Policies Update	Update the existing capital fund policies ahead of the annual budget process to align with the TDA Strategic Plan goals and objectives related to association facilities and infrastructure, including a long-term funding strategy and financial plan for capital improvement and reinvestment, and building replacement.	<p>Capital policies updated</p> <p>Capital Funding Schedules updated</p> <p>Updated inventory of TDA's existing buildings including a replacement schedule and project costs</p>	<p>Working group work sessions and strawman model <b>completed</b></p> <p>Capital Funding Schedules updates - 2025 budget process (Q3)</p> <p>Updated inventory of TDA's existing buildings replacement schedule and estimated costs <b>completed</b></p>	<ul style="list-style-type: none"> <li>• Policy drafts in progress</li> </ul>	In Progress and Target to complete early 2025
	5.2	2. Downhill Ski Lodge Replacement	The planned and approved Downhill Ski Lodge replacement project continues with board decision-making along the project path. The project is completed on time and on budget once construction begins.	<p>Project milestones and critical success factors</p> <p>KPIs</p> <ul style="list-style-type: none"> <li>•Project Net Benefits – contribution to TDA revenue, cost savings, increased output</li> <li>•% and \$ of project cost efficiencies</li> </ul>	<p>2024 Milestones Q1 and Q2</p> <ul style="list-style-type: none"> <li>• Construction Services Agreement &amp; Project Budget Approval <b>complete</b></li> <li>• Demolition - <b>complete</b></li> <li>• Earthwork - <b>complete</b></li> </ul>	<p>2024 Milestones Q3 and Q4</p> <ul style="list-style-type: none"> <li>• Site winterization - <b>complete</b></li> <li>• Steel erection - <b>complete</b></li> <li>• Rack and line steel structure - <b>complete</b></li> </ul>	2024 Complete and Project On Target for Completion in 2025
D. Organizational Development	3.2 & 3.3	1. Organizational and People Development	<p>Ensure a plan is developed and implemented that identifies and evaluates the mechanisms, tools, and internal processes needed for greater organizational effectiveness.</p> <p>Updated and enhanced organizational performance metrics - qualitative and quantitative - will be implemented for measuring success.</p> <p>Employee talent and core competencies are grown to meet the current and future needs of Tahoe Donner through organizational development, training, and succession planning.</p>	<p>Revised and enhanced organizational planning process milestones</p> <p>Standards of Excellence established</p> <p>DOMO software facilitated organizational performance dashboard: safety, customers, internal processes, financial performance, workforce efficiency, and employee engagement</p> <p>KPIs</p> <ul style="list-style-type: none"> <li>•ROI for acquisition and/or replacement of technology or software</li> <li>•Variable Business Operating Plan (VBOP) model for labor efficiency</li> <li>•% of Employee Satisfaction</li> <li>•% of Line and Support staff taking part in employee development training- total number of hours in training</li> <li>•% of Leaders taking part in management and leadership development</li> <li>•% of Employees using technology platforms</li> </ul>	<p>Initiated plan detailing revised and enhanced organizational planning process and milestones including, 12-month departmental calendar development, revised budget process and timeline, and committee involvement</p> <p>Initiated Standards of Excellence initial discussion through employee satisfaction surveys, management team discussions</p> <p>DOMO software facilitated organizational performance dashboard and other reporting efficiencies:</p> <ul style="list-style-type: none"> <li>• New reporting built for FR&amp;B analytics, Recreation Fee and Annual Assessment Pace Reports</li> <li>• Elections - The Domo integration has saved staff at least 20 hours of effort that used to be done by Comdep manually for election related processing.</li> <li>•Misc. - Domo has also been amazing with the flash report distribution and how we pull TD News mailing list monthly. This also saves about 2 hours each month and give us a much better sense of confidence in the list.</li> </ul> <p>KPIs</p> <ul style="list-style-type: none"> <li>•75% of line/support staff take part in department orientation/training. Summer seasonal count X/approximately X hours of training</li> <li>•75% of Leaders took part in management and leadership development in Q1&amp;2; (2) supervisors/managers participated in the North Lake Tahoe Truckee Leadership program, and 3-4 supervisors completed coursework/seminars or certificate programs</li> <li>•98% of Employees using technology platforms</li> </ul>	<p>Developed Multi-Year Administrative Policy Resolution Review and Update Schedule and began work on 2024 policies</p> <p>Committee Guidelines – created Agendas, Minutes and Personnel Report guidelines with templates and provided to all Committee Chairs/Vice Chairs</p> <p>Instituted new cross-organization Strategic Annual Objectives training and talking points. Instituted a new weekly employee communication dashboard to communicate the most important information across the organization.</p> <p>KPIs</p> <ul style="list-style-type: none"> <li>• 77% of line/support staff participate in department orientation/training, and the overall eLearning average is 78%.</li> <li>• 78% of Leaders took part in management and leadership development in Q3&amp;4; 3-4 supervisors/managers completed coursework/seminars or certificate programs</li> <li>• 98.2% of Employees using technology platforms</li> <li>• FTYR and Seasonal Employee Satisfaction survey; 41 out of 85 responded. 76.48% positive responses (agree &amp; strongly agree), 5.92% negative (disagree &amp; strongly disagree), &amp; 17.38% neutral (neither agree nor disagree) across all the survey questions</li> <li>• Winter and Summer Safety Employee survey; 91.5% safety satisfaction rating</li> </ul>	2024 Complete
	3.3	2. Strategic Interagency Relationships	Tahoe Donner maintains effective interagency partnerships with public and private agencies including but not limited to the Town of Truckee, Truckee Fire Protection District, Truckee Public Utility District, United States Forest Service, Truckee River Watershed Council, Truckee Donner Land Trust, etc., through networking, coordination, cooperation, and collaboration to maintain consistent services, prioritize projects and initiatives, and identify opportunities for grants and other funding benefitting the community.	<p>Through assessment tools:</p> <ul style="list-style-type: none"> <li>•Depth of involvement with each agency assessment</li> <li>•Quality of interaction assessment</li> </ul> <p>Project/initiative objectives</p> <p>Annual outside funding</p>	<p>Initiatives Milestones:</p> <ul style="list-style-type: none"> <li>• Emergency Preparedness: grant projects scope and mapping, grant submissions; requests for Town of Truckee TSSA-1 funds for the Town's fiscal year 2024/2025 and Town Council approval; participation in regional emergency management tabletop exercises; completed TDA emergency preparedness summer communication plan</li> <li>• Recreational enhancement and land resiliency and restoration</li> </ul> <p>Outside Funding Secured</p> <ul style="list-style-type: none"> <li>• Tahoe Truckee Community Foundation - Truckee North Tahoe Forest Program Grant Award \$82,969.39 for a fuels modification project</li> <li>• CalFire Multi-Year 2024-2026 Grant totalling \$586,850 for a fuels modification and reforestation project</li> <li>• Town of Truckee TSSA-1 Funds \$765,920 benefitting Tahoe Donner</li> <li>• New Class 1 Trail Evaluation, Planning, and Design Yr1 \$240,000</li> <li>• Emergency Evacuation Feasibility Study project \$250,000</li> <li>• Emergency Evacuation Planning project \$25,920</li> <li>• Roadside Vegetation Management \$250,000</li> </ul>	<ul style="list-style-type: none"> <li>• Agency partnership assessment complete</li> </ul>	Complete