

2025 ANNUAL STRATEGIC OBJECTIVES Q1 + Q2 REPORTING

Objective Focus Area	Strategic Plan Initiative + Goal	Objective	Description	Measurements + Metrics	Measurements + Metrics Q1 + Q2 Reporting	Looking Ahead Measurements + Metrics Q3 +Q4	KPI Reporting
A. Amenity Access Improvement	2.2 & 2.3	1. Amenity Access Rule Change	<p>Concluding a three-year process, the Amenity Access rule was adopted to improve member experience. A Multi-Year Amenity Access Implementation Plan for enacting the updated policy was adopted in parallel with an Amenity Access Rule Change.</p> <p>An annual Operating Plan is developed and reviewed by the board during the budget process and communicated to the membership.</p> <p>A comprehensive communication campaign and ongoing member education plan is established, implemented, and monitored for effectiveness.</p>	<p>Adoption of updated Amenity Access Rule</p> <p>Approved Multi-Year Amenity Access Implementation Plan objectives and milestones</p> <p>Semi-annual review of Amenity Access Implementation Plan, and Annual Review of Operating Plan</p> <p>Software enhancement for Amenity Access card and personal changes rollout objectives and milestones</p> <p>Key Indicators</p> <ul style="list-style-type: none">•Communication open and click-through rates•Utilization data analysis•2025 Member Survey – questions on Amenities	<p>Upon passing, a comprehensive communication and 6-quarter roadmap was developed to communicate with specific segments and the general membership on changes as they become pertinent in the implementation plan, including STR cards registration, guest cards/access, realtor campaign, adding members to an account, validation, etc.</p> <p>Robust web portal, rack cards, direct mailers, explainer video, realtor flyer, training documents, how-to documents created, upload forms, exception process, appeal process, etc.</p> <p>A new payment portal was created to automatically apply access, an assessment of its successes and improvements was complete and payment portal 2.0 RFP was issued with a vendor selected to enhance and improve the platform in Q3.</p>	<p>Q3 - Develop a 2026 Operating plan and identify any budget impacts to ensure they are included in the 2026 operating budget. Create and implement 2025 Member Usage and Satisfaction Survey with key section on member benefit and amenity usage.</p> <p>Q4 - Compile and draft recommended changes to the Amenity Access rule for 2026 Q1 board review and subsequent member 45-day notification period. Analyze survey results with the F'Inn Group.</p>	<p>Member Dedicated emails for Rec Fee, Guest Cards, Adding Members, Reservations/Operating Plan, etc.</p> <p>4 dedicated STR emails, average open rate of 80.6%, 9.9% click-through, ~600 STR's signed up for STR cards</p> <p>~2,800 new member ID cards validated and printed</p> <p>Budget approval with Operating Plan impacts included</p>
B. Member Value + Strengthening Community	6.1 & 6.2	1. Member Relations + Engagement	<p>Execute identified areas of improvement and opportunities to increase member value, trust, awareness, and member satisfaction. Adapt and evolve programs and services following analysis of feedback from the 2023 Member Survey.</p> <p>The 2025 Member and the Communication Preferences Surveys are conducted to analyze member opinion, utilization, satisfaction, needs, priorities, and barriers to access and participation.</p> <p>Continue strengthening member community building through member events such as quarterly Member Happy Hour, Stewardship and Community Volunteer events, and annual events.</p> <p>Develop and implement renewed member education on member value relating to the core HOA services for enhancing, protecting, maintaining and enforcing community standards including fire resiliency.</p>	<p>Plan and implementation objectives for engagement and value for 2025 in partnership with a variety of amenities and F+B outlets</p> <p>2025 Member and the Communication Preferences Surveys launched and analyzed for developing action plans.</p> <p>Key Indicators</p> <ul style="list-style-type: none">•HappyOrNot + Zendesk Customer Satisfaction Scores•Member utilization, where trackable•\$/%/# of member discounts and special opportunities•Communication open and click-through rates•% of survey respondents•Survey results•Stewardship and volunteer events participation metrics•\$/% property engagement through inspections, consultation, community relations, and complaint resolution	<p>Member feedback, including from a variety of post-event surveys, were used to help design and evolve a variety of program offerings.</p> <p>The 2025 Comm Preferences survey was launched and completed by 1984 members. Survey data was analyzed and reported to the board. A variety of changes were implemented including changing subject line writing, frequency of emails and linking to source info.</p> <p>Member events were held and planned for the summer including 4 happy hours, a new homeowner welcome and a series of stewardship events and forestry site tours.</p> <p>An HOA education content plan was created including extensive education on forestry and capital improvements.</p>	<p>Q3- planning from Q2 is being implemented including New Homeowner event, Member Happy Hour, Stewardship, music series and health events at Trout and tennis. Member Survey implemented in Q3</p> <p>Q4 - Member Survey analyzed, presented to the board in Dec or Jan.</p>	<p>Survey data indicated the following:</p> <ul style="list-style-type: none">-continued upward trend in satisfaction of communication. 77% were either extremely or very satisfied. Open ended feedback shed light into areas of opportunity- Post event surveys for Summer Concert on the Green, Easter, Summer Music Series indicate strong appreciation with above industry standard Net Promotor Scores, particularly for the Summer Concert on the Green. New years Event was not well received and needs major overhaul if continued.- Q1+2 saw an increase in HappyOr Not in both F+B and Amenities (up 3% for F+B, up 4% for Amenities YoY). ACC saw 14% decrease in satisfaction due to no hot food.- Happy or Not and Zendesk scores took a hit over restrictions and reservations over 4th of July week including -4% in Zendesk y-o-y and overall major decrease in HappyOrNot in all departments but Pizza on the Hill.

2025 ANNUAL STRATEGIC OBJECTIVES Q1 + Q2 REPORTING

Objective Focus Area	Strategic Plan Initiative + Goal	Objective	Description	Measurements + Metrics	Measurements + Metrics Q1 + Q2 Reporting	Looking Ahead Measurements + Metrics Q3 +Q4	KPI Reporting
C. Land Management Planning & Stewardship	1.1,1.2, 2.1,3.2, 4.1, 4.2, 5.2, 5.3	1. Land Management Plan Update	The Land Management Plan (LMP) update process will begin in 2025 through a robust board and member engagement process culminating with the development and adoption of an updated LMP in 2026. The LMP update will evolve from the 2016 LMP to address growing and changing use, environmental impacts, and updated regulatory conditions. The LMP will include both developed and undeveloped portions of Association-owned land, and private parcels of the subdivision.	Land Management Plan (LMP) update process objectives and milestones Key Indicators •Member engagement event metrics •Communication open and click-through rates •% of survey respondents •Survey(s) results	No planned activities to measure during this period.	Finalize project outline sheet with GM and select directors and teams which may be involved on project. The project sheet will define goals, objectives and desired outcomes of the LMP. Create and release RFP for portions of the project which require outside consulting, 30 day response period. Review RFP responses with GM, select directors and teams which may participate in project. Tentatively select outside consultant by end of goal date. 10/31.	None to report
	1.1, 1.2, 3.2, 4.1, 4.2, 5.3	2. Fire Safety and Forest Health Rules Update	Association rules regulating fire safety and forest health are updated to adhere to established best practices, and changes in local, State, and Federal regulations, through a member engagement process culminating in the rule-making notification process and adoption of the rule change. A Fire Safety and Forest Health rule change implementation plan is included which refines existing practices for forest health and defensible space and includes member education and outreach about the rules changes. As part of the member education and outreach, concise communication of local and state laws and ordinances is created to establish clearer understanding of the regulations and fire protection agencies and TD roles in relation.	Adoption of proposed Fire Safety and Forest Health rules changes Fire Safety and Forest Health rules changes implementation plan objectives and milestones Member Education/Outreach objectives and outcomes Key Indicators •Member engagement event metrics •Communication open and click-through rates •80% property engagement through inspections, consultation, community relations, and complaint resolution	See Staff Report dated August 22, 2025	Respond to regulatory changes and requirements as needed. See Staff Report dated August 22, 2025	None to report
D. Organizational Development	3.1, 3.2 & 3.3	1. Organizational and People Development	Operating Plans and new operational strategies are developed to improve cost-effectiveness, optimize visitation and participation in programs and services, and achieve a high level of user satisfaction with amenities and services. Ensure standard operating procedures (SOPs) are clarified, refined, rolled out, and reinforced. Continue to systematize and enhance organizational and governance performance metrics - qualitative and quantitative - for measuring continuous improvement, success, operational adjustments, and tracking initiatives and resource utilization to demonstrate how, and how well, actions and initiatives align with the governing documents. In support of organizational development, training, and succession planning, cultivate new employee talent and core competencies, and strengthen existing competencies to meet the current and future organizational needs.	Revised and enhanced organizational planning process milestones Revised and enhanced SOP results measured with employee surveys and operational audits DOMO software facilitated organizational performance dashboard: safety, customers, internal processes, financial performance, workforce efficiency, and employee engagement KPIs •ROI for acquisition and/or replacement of technology or software •% of Employee Satisfaction •% of Line and Support staff taking part in employee development training + total number of hours in training •% of Leaders taking part in management and leadership development •% of Employees using technology platforms •80% property engagement through inspections, consultation, community relations, and complaint resolution	Completed revised Annual Budget Development Process, proposed to Board and implementing for 2026 Annual Budget Development Process Winter seasonal employee surveys are completed on time and reported to the management team SOPs updated and monitored for effectiveness and practice	Summer and FTYR employee surveys planned Further DOMO dashboard reporting refinement	•75% of Line and Support staff taking part in employee development training + 2,640 total number of hours in focused areas of training (does not include dept training); Target 80% •82% of Leaders are took part in special industry, management and leadership developmen in Q1&2; 85% in internal development; target 85% •83% of Employees using technology platforms; Target 97%

2025 ANNUAL STRATEGIC OBJECTIVES Q1 + Q2 REPORTING

Objective Focus Area	Strategic Plan Initiative + Goal	Objective	Description	Measurements + Metrics	Measurements + Metrics Q1 + Q2 Reporting	Looking Ahead Measurements + Metrics Q3 +Q4	KPI Reporting
D. Organizational Development	3.3 & 3.5	2. Good Governance	<p>Through a multi-year process, Association policy resolutions are reviewed and updated to serve current and future needs, and to comply with the Davis-Stirling Act, and other laws and regulations.</p> <p>Staff, committees and the Board will support implementation of administrative policies and Association rules changes.</p> <p>Implementation of the Capital Funds policies updates will align with long-range capital improvement planning and the annual budget process.</p> <p>.</p>	<p>Multi-Year Policy Resolution Schedule: Proposed 2025 policies reviewed and updated as needed</p> <p>Capital Fund schedules updated</p>	<p>Board approved Capital and Financial Policies June 28, 2025</p>	<p>Initiated drafting of: New - General Policy for the Establishment and Procedures for Operating Chartered Club</p> <p>Major Update - Policy Regarding the Maintenance of Tahoe Donner's Association's Income Tax Exempt Status</p> <p>In response to AB 130, develop proposed changes to enforcement procedures and fine schedules</p> <p>Proposed updates to the Architectural Standards Rules 45-day notice and board consideration to adopt</p>	<p>None to report</p>