

DRAFT 2026 ANNUAL STRATEGIC OBJECTIVES

The Tahoe Donner Board of Directors adopted a new 5-year Strategic Plan in 2021. The plan outlines six key initiatives from which goals and objectives are identified. This document details the 2026 Annual Strategic Objectives that are intended to address the initiatives and goals. It can be complemented by the staff's internal plans and the committees' annual task lists, which enumerate all the tasks that committees are committed to undertake in 2026 and identify tasks in the committee charters or administrative policy. As such, the Annual Strategic Objectives do not repeat or include those goals, projects, or tasks. Instead, the objectives are intended to help TDA successfully manage the organizational change envisioned by the Strategic Plan and measure the success of each objective, thereby achieving its Vision of Success.



This work plan is:

- Based on information and feedback gathered through work sessions with staff and the Board of Directors discussion
- Focused on objectives for 2026
- Accepted by the staff
- Discussed with respective committees
- Recommended to the Board of Directors
- Approved by the Board of Directors (TBD)

The document is designed to be a “living document” continuously updated as progress is made. The most current version of the plan will be found at www.tahoedonner.com/strategic-plan.

The 2026 Annual Strategic Objectives focus areas are:

- A. Enhancing Member Experience
- B. Long Range Community Planning

Objective Focus Area: Enhancing Member Experience

Strategic Plan Initiative + Goal: 2.3, 6.1, 6.2

Annual Strategic Objective: Enhancing Member Enjoyment and Use of Amenities

Objective Description: Effectively implement the adopted Amenity Access Rule Change and the corresponding Multi-Year Amenity Access Implementation Plan to elevate member experience, improve operational efficiency, and promote the long-term enjoyment and use of amenities by members.

Key Actions

- **Operational Integration:**

Integrate the Amenity Access Implementation and Annual Operating Plan, ensuring alignment with strategic priorities and budget considerations. The Annual Operating Plan will be reviewed and approved by the Board during the Annual Budget Development Process.

- **Member Communication and Engagement:**

Refine the comprehensive communication campaign that informs and engages members about the new Amenity Access rules. This includes clear messaging, a Year 2 rollout schedule, and feedback mechanisms to ensure member awareness and adjust messaging accordingly.

- **Education and Support:**

Deploy the continuous member education strategy Year 2 plan and refine in-person sessions, digital resources, and on-demand support. Monitor participation rates and member feedback to refine the approach and ensure accessibility and understanding.

- **Monitoring and Evaluation:**

Regularly assess the effectiveness of implementation efforts, member communication, and educational outreach. Provide updates to the Board, identify areas for improvement, and implement data-driven adjustments to optimize outcomes.

Key Results

- Semi-annual review of the Amenity Access Implementation and Operating Plan
- Deployment of software enhancements on the Member Payment Portal to support Member ID Card functionality
- Measurable improvement in member understanding and satisfaction with access policies

- Measurable improvement in member amenity usage and enjoyment
- Data-driven decision-making to support ongoing refinement of access procedures
- High adoption and compliance rates with member validation
- Demonstrated improvements in amenity utilization and member usage
- Continued Board confidence through transparent reporting and achievement of measurable outcomes

Metrics + Targets

- Member satisfaction with amenity access \geq 85% positive
- Member validation \geq % of members by X
- Member support sessions rating %
- Implementation milestones met 100% on schedule
- Software enhancements to Member Payment Portal delivered
- On-time
- Board confidence (measured via reporting feedback) consistently rated “High”

Staff Lead(s)

Miguel Sloane, Director of Operations

Lindsay Hogan, Director of Communications and Member Relations

Committee Involvement

Finance Committee as part of the 2026 Budget Process

Objective Focus Area: Enhancing Member Experience and Benefit

Strategic Plan Initiative + Goal: 6.1 & 6.2

Annual Strategic Objective: Enhance Satisfaction Through Responsive Improvements

Objective Description: Enhance member satisfaction by executing identified improvements, increasing member value and trust, raising awareness of services, and continuously adapting programs based on member feedback.

Key Actions

- Evolve & Communicate Member Value

Develop and distribute educational content to explain the value of core HOA services, including fire resiliency, maintenance, and enforcement of standards.

Highlight how services protect and enhance property value and community well-being.

- Strengthen Community Building & Participation

Host recurring member engagement events, including but not limited to: Quarterly Member Happy Hours, Stewardship and Community Volunteer Events, Music Series, Bingo, Annual Member BBQ/Expo

Promote these events through targeted communications aligned with members' stated preferences.

- Improve Access & Reduce Participation Barriers

Utilize survey feedback to identify and address key barriers to member participation (e.g., time, awareness, digital access).

Refine communication channels and formats based on the Communication Preferences Survey.

Key Results

- Action plans developed within 90 days of survey results presentation.
- At least 3 new or enhanced programs or services implemented based on survey insights.
- Monthly educational content published via newsletters, email, and social media.

Metrics + Targets

- Monthly educational content published via newsletters, email, and social media.
- At least 2% growth surveyed members indicate improved understanding of HOA services and value.

- Minimum of 4 Happy Hours and 6 Stewardship events held annually.
- 2% increase in event participation over 2025 in events not currently reaching 75% capacity.
- X% of event attendees report positive satisfaction in post-event surveys.
- X% increase in engagement with distributed communications.
- Documented reductions in identified barriers (e.g., accessibility accommodations, clearer event sign-ups, flexible scheduling).
- HappyOrNot + Zendesk Customer Satisfaction Scores \geq %
- Communication open and click-through rates maintained at 15%

Staff Lead(s)

Miguel Sloane, Director of Operations

Mike Peters, Director of Food and Beverage

Lindsay Hogan, Director of Communications and Member Relations

John Groom, Director of Land Management

Admin Services - Jason Hajduk-Dorworth, Director of Administrative Services

Justin Malley, Director of Accounting

Committee Involvement

Trails and Open Space Committee: Supporting stewardship events and other volunteer events

Long-Range Planning Committee: Review and provide input regarding (2) survey questions specifically relating to long-range planning (like they did for the Northwoods Campus)

Finance Committee: as part of the 2026 Annual Budget Development Process

TD Giving Fund: as part of their annual tasks for community relations and social benefit

Strategic Topic: Long Range Community Planning

Strategic Plan Initiative + Goal: 1.1,1.2, 2.1,3.2, 4.1, 4.2, 5.2, 5.3

Annual Strategic Objective: Update Land Management Plan

Objective Description: Launch and complete a comprehensive update of the 2016 Land Management Plan (LMP). The updated LMP will address increased land use, environmental impacts, and regulatory changes, covering both developed and undeveloped Association-owned land and private parcels.

Key Actions

- Initiate a structured update process in 2025.
- Evaluate current and emerging environmental and regulatory conditions.
- Identify gaps and new issues to include in the update.
- Include the development of the Timber Harvest Plan as a plan element.
- Draft and refine updated LMP throughout 2025–2026.
- Finalize and adopt updated LMP by end of 2026 or early 2027.

Key Results

- Clear LMP update timeline with tracked milestones.
- Excellent participation by identified stakeholders, including the Trails and Open Space Committee, outside natural resource specialists, and management partners.
- A comprehensive strategic plan that guides the policy and management of the landscape, protects environmental resources, applies modern technical approaches toward land management.
- A Timber Harvest Plan as part of the LMP providing a full suite of addressing land management of association-owned land
- Increased awareness and understanding of land management goals.

Metrics+Targets

- LMP update milestones achieved on schedule; Target 100%
- Hold at least 6 # stakeholder engagement events
- Draft LMP available for member and board review by the target date.

Staff Lead(s)

John Groom, Director of Land Management

Committee Involvement

Trails and Open Space Committee: Provide member perspective review and advice regarding the Land Management Plan update at key stages of the plan's development.

Annual Strategic Objective: Develop New Tahoe Donner Community Plan

Strategic Plan Initiative + Goal: 3.3, 4.2, 5.1, 5.2, 6.1, 6.2

Objective Description: Begin a multi-year, structured initiative to develop a comprehensive Tahoe Donner Community Plan (TDCP), grounded in a new, future-oriented community vision and mission. The initiative will:

- Use a collaborative, inclusive process engaging key stakeholders and community members.
- Implement a robust engagement and outreach strategy to ensure broad input and community ownership.
- Align with other association long-range plans and recognize relevant external agency plans.
- Focus on enhancing quality of life, community identity, and building a living legacy for future generations.
- Inspire members to imagine future possibilities, contribute meaningfully, and feel proud to participate.

*Note, the above are initial draft statements which are expected to develop as part of Phase 1 of the project.

Key Actions

Phase 1: Project Launch and Governance Setup:

- Define project scope, timeline, and project leads, roles and responsibilities
- Establish project goals and expected outcomes
- Develop and release Request for Proposal (RFP)
 - Identify key business questions to include in the RFP
- Award bid to selected consultant/team

*Draft Note: Phase 1 is projected to begin at an undetermined time period in 2026, but is expected to close out 2026. Phase 2 and beyond would be part of the 2027 plan.

Phase 2: TDA Identity: Initiate Mission and Vision Statements Review and Update

Phase 3: Long Range Focus Areas

Phase 4: Plan Development

Phase 5: Plan Adoption

Key Results + Indicators

- A clearly defined project timeline with tracked milestones and accountability measures.
- A comprehensive roadmap for infrastructure improvements and sustainable community well-being.
- A renewed and shared future-oriented community vision mission.
- A long-range strategic plan that guides future capital investments, supports community lifestyle, financially sustainable operations, and protects environmental resources.
- Active and engaged participation from the Board, committees, and community members in both planning and decision-making.

Metrics + Targets

- TDCP process milestones met on time; Target 100% of Year 1 milestones achieved
- Member engagement event attendance; Target 15+ total participants per event
- Email communication open rate; Target 40% average open rate
- Email click-through rate; Target 15% average CTR
- Community survey response rate $\geq 25\%$ of total households
- Stakeholder interviews/focus groups held 10+ across different demographics
- Alignment score with existing plans $\geq 85\%$ overlap on major themes/goals
- Community sentiment (positive); Target $\geq 70\%$ express optimism about the future

Staff Lead(s)

Annie Rosenfeld, General Manager

Jon Mitchell, Director of Capital Projects and Facilities

Committee Involvement

During Phase 1, the Long Range Planning Committee will be the primary committee assisting staff and the Board with development of the TDCP RFP. This work will include assisting staff in preparatory listening sessions, working with staff to identify key business questions and community issues, and advising the Board and staff throughout the RFP development process.

Beyond Phase 1, the Long Range Planning Committee is expected to remain the primary committee assisting staff and the Board with future project phases. The committee's role during these future phases will be defined once the scope and structure of the future phases are defined. However, it is assumed and expected that all Tahoe Donner committees will participate in the TDCP process to ensure that the TDCP incorporates input from all Tahoe Donner member committees.