

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 accomplish 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 undertaking in 2026 and identify tasks outlined in the committee charters or administrative policies. 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 and Benefits
- B. Long Range Community Planning

1. 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, address overcrowding, improve operational efficiency, and promote the long-term enjoyment and use of amenities by members.

Objective Focus Area: Enhancing Member Experience and Benefits

Strategic Plan Initiative + Goal: 2.3, 6.1, 6.2

Key Actions

- **Operational Integration:**

Integrate the Amenity Access Implementation and Annual Operating Plan to ensure 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. Review the Amenity Access Rule and, if appropriate, propose updates.

- **Member Communication, Education, and Engagement:**

Refine the comprehensive communication campaign and member education strategy for Year 2 to inform and engage members about the new Amenity Access rules. This includes clear messaging, a Year 2 rollout schedule, and feedback mechanisms to ensure member awareness, continuing to use in-person sessions, digital resources, and on-demand support.

- **Evaluation:**

Monitor and evaluate member feedback to refine the approach and ensure accessibility and understanding.

- **People/Employee Development:**

Invest in staff development to ensure that team members are equipped with the knowledge, skills, and support necessary to deliver a high-quality, responsive member experience consistently. Engage employees as active partners in refining operational practices through targeted training, professional growth opportunities, and structured feedback channels that support continuous improvement.

Key Results

- Semi-annual review of the Amenity Access Implementation and Operating Plan.
- Updates to the Amenity Access Rules as appropriate.

- Deployment of software enhancements on the Member Payment Portal to support Member ID Card functionality.
- Developing a baseline for satisfaction with the member benefits package.
- Analyze the 2025 Member Survey to create action plans related to amenity usage and satisfaction, the value of the member benefits package, and barriers to usage.
- Data-driven decision-making to support ongoing refinement of access procedures.
- Demonstrated effective management to prevent overcrowding and prioritize member experience through the Amenity Access Operating Plan.
- Meeting goals for contacting members and compliance rates with member validation.
- Updated staff training and development program regarding the Amenity Access Rule and Year 2 of the Amenity Access Implementation Plan, and Tahoe Donner customer service expectations.
- Continue with ongoing feedback loops between staff and leadership, gathering frontline input on operational challenges and member interactions.
- Continued Board confidence through transparent reporting and achievement of measurable outcomes.

Metrics + Targets

- Member satisfaction with amenities trends positively from the Member Satisfaction and Usage Survey
- 12,500 members validated by December 31, 2026
- Member support sessions rating continues to exceed the industry average of 92%
- Implementation milestones met 100% on schedule
- Software enhancements to Member Payment Portal delivered on time
- 100% of frontline staff completed training on member and guest communication and education, access protocols, and member prioritization, conflict resolution, and service standards

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

2. Annual Strategic Objective: Enhance Satisfaction Through Responsive Improvements

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

Objective Focus Area: Enhancing Member Experience and Benefit

Strategic Plan Initiative + Goal: 6.1 & 6.2

Key Actions

- **Evolve & Communicate Member Benefits and Value**

Develop and distribute educational content to explain the value and benefits of the association, including core HOA services like fire resiliency, maintenance, and enforcement of community standards. Highlight how services protect and enhance property value and community well-being. Review and update community standards rules as needed, including those related to regulatory changes and updates.

- **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, etc.

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

- **Improve Access & Reduce Participation Barriers**

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

Refine communication practices and formats based on the results of the Communication Preferences Survey.

- **People/Employee Development:**

Invest in staff development to ensure that team members are equipped with the knowledge, skills, and support necessary to deliver a high-quality, responsive member experience consistently. Engage employees as active partners in refining operational practices through targeted training, professional growth opportunities, and structured feedback channels that support continuous improvement.

Key Results

- Action plans developed within 90 days of the 2025 Member Usage and Satisfaction survey results presentation.
- Identify new, enhanced, or substituted programs or services implemented, if there are clear indicators for areas of improvement based on survey insights.
- Updates to the community standards rules as appropriate.
- HappyOrNot + Zendesk Customer Satisfaction Scores are monitored, maintained, or improved.
- Monthly educational content published via association communication channels.
- Re institute HOA service surveys for programs, including Community Standards and Defensible Space programs
- Updated staff training and development program regarding the Amenity Access Rule and Year 2 of the Amenity Access Implementation Plan, and Tahoe Donner customer service expectations.
- Continue with ongoing structured feedback process between staff and leadership, gathering frontline input on operational challenges and member interactions.

Metrics + Targets

- Minimum 12 educational communications published via association channels.
- Minimum of 4 Happy Hours and 6 Stewardship events are held annually.
- Increase in Stewardship event participation over 2025 in events not currently reaching 75% capacity.
- 75% of event attendees report positive satisfaction in applicable post-event surveys.
- Sustain member satisfaction scores (minimum of 84%) related to staff helpfulness, responsiveness, or professionalism in the following Member Satisfaction and Use survey, and other one-off programmatic surveys.
- Monthly GM email engagement metrics maintained at above 50% open rate and 2% click through.
- 100% of frontline staff completed training on member engagement and education, problem resolution, and service standards

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

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

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

3. Annual Strategic Objective: Update Land Management Plan

Objective Description: Building upon the 2016 Land Management Plan, complete a comprehensive and updated 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, as well as private parcels. The updated LMP will also include implementation and monitoring plans.

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

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 the updated LMP by the end of 2026 or early 2027.

Key Results

- Clear LMP update timeline with tracked milestones.
- Excellent participation from the identified stakeholders, including the Trails and Open Space Committee, outside natural resource specialists, and management partners.
- A comprehensive plan that guides the policy and management of the landscape, sustainably protects environmental resources, and applies modern technical approaches toward land management.
- A Timber Harvest Plan as part of the LMP, providing a full suite of strategies addressing land management of association-owned land.
- Established strategic, long-term partnerships with external stakeholders to leverage resources and advance natural resource stewardship and sustainability policies and goals.
- Increased member, committee, and board awareness and understanding of land management goals.

Metrics + Targets

- LMP update milestones achieved on schedule; Target 100%
- Hold at least 6 # stakeholder engagement events, in addition to routine project updates at TOS meetings
- 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.

4. 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:

- The Board will provide strategic oversight for the initiative, while staff will be responsible for project management and implementation, with committee engagement and involvement as specified below.
- Use a collaborative and inclusive process that engages key stakeholders and community members.
- Implement a robust member engagement and outreach strategy to ensure broad input and membership 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 the Project Organization of the initiative.

Key Actions

Project Organization: Project Launch and Governance Setup:

1. Subject to board approval, define project scope, parameters, timeline, and project leads, roles, and responsibilities. The project parameters are expected to uphold the Association's current governing documents, maintain its status as a 501(c)(4) tax-exempt organization, ensure adherence to applicable California law, and acknowledge Tahoe Donner's location and jurisdiction within the Town of Truckee and other special districts.
2. Establish project goals and expected outcomes
3. Determine member outreach and feedback to occur during the Project Organization and during Phases 1-4
4. Develop and release Request for Proposal (RFP) for consulting services and plan development
 - a. Identify key business questions to include in the RFP
 - b. Identify what Tahoe Donner would be asking from the consultant
5. Award bid to selected consultant/team

The Project Organization is projected to begin at an undetermined time period in 2026 but is expected to close out 2026. The Project is envisioned to include four phases, as described below, to be completed in 2027.

Phase 1: TDA Identity: Initiate Mission and Vision Statements Review and Update

Phase 2: Long Range Focus Areas and Plan Development

Phase 3: Community Socialization and Feedback on Draft Plan

Phase 4: Plan Adoption

Key Results + Indicators

- A clearly defined project timeline with tracked milestones and accountability measures.
- Review and utilize long-range planning questions in the 2025 Member Satisfaction and Usage survey to develop a survey tool to inform the TDCP development process.
- A comprehensive roadmap for infrastructure improvements and sustainable community well-being.
- A renewed and shared future-oriented community mission and vision.
- A Tahoe Donner Community Plan that guides future capital investments, supports community lifestyle, financially sustainable operations, and protects environmental resources.
- Three- to five-year strategic plans are developed to implement the Tahoe Donner Community Plan, with annual objectives guiding execution. 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
- 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

Lindsay Hogan, Director of Communications and Member Relations

Committee Involvement

Long-Range Planning Committee:

Review and provide input regarding the (2) Member Survey questions specifically relating to long-range planning (like they did for the Northwoods Campus)

During the Project Organization of the Tahoe Donner Community Plan project, 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 the Project Organization, the Long Range Planning Committee is expected to remain the primary committee assisting staff and the Board with the 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 current Tahoe Donner committee members.