



2027 Annual Strategic Objectives

2027 Focus Areas

Enhancing Member Experience and Benefits | Long Range Community Planning

2027 Work at a Glance

Objective	Primary 2027 Phases	Expected 2027 Outcome
Amenity Operating Model Review	Assess, Develop, Review, Board Direction	Complete the Equestrian and Food and Beverage reviews and obtain Board direction.
Develop New Tahoe Donner Community Plan	Develop, Review, Adopt	Present the TDCP, implementation framework, and draft three-year Strategic Plan.
Modernize Architectural Standards and Covenants Rules	Assess, Develop, Review	Present a complete draft rules package for initial Board review in late 2027.
Digital Services	Implement, Assess, Future Direction	Launch the Finance software and website projects and recommend the initiative's next phase.
Amenity Access Rule Implementation Year 3	Implement, Transition to Operations	Complete Year 3, substantially complete validation, and transition to annual operations.

Objective 1: Align Amenity Operating Models with Member Enjoyment Value and Financial Performance

Purpose: Initiate a comprehensive amenity operating review to evaluate whether amenity operating models remain aligned with evolving member needs and current business conditions. Where historical assumptions about demand, service levels, costs, or revenues may no longer hold, identify operating approaches that improve financial performance while supporting member enjoyment and value. The evaluation will also consider future service levels, facility needs, opportunities to enhance member use, and implications for future service and capital decisions.

In 2027, this objective will focus on Equestrian and Food and Beverage. This initiative will continue in 2028, with findings from the Tahoe Donner Community Plan and 2027 Member Usage and Satisfaction Survey helping to identify additional amenities for review.

2027 Board Decisions and Deliverables

- Staff recommendations on the Equestrian and Food and Beverage operating models by end of Q1, supported by a comparison of viable alternatives and their implications for member value, financial performance, Annual Assessment, service levels, facility needs, and capital investment.
- Strategic Board direction, as appropriate, in time to inform service and capital planning, the 2028 budget, and the three-year Strategic Plan.

Objective 2: Develop the New Tahoe Donner Community Plan

Purpose: Complete the multi-year, structured development of a comprehensive Tahoe Donner Community Plan (TDCP), grounded in a renewed, future-oriented community vision and mission. Through an inclusive and transparent process, establish the long-range direction that will guide



strategic planning, capital investment, land stewardship, community lifestyle, member value, financial sustainability, and organizational priorities.

2027 Board Decisions and Deliverables

- Board confirmation of the mission, vision, guiding principles, long-range focus areas, and major policy choices emerging from the planning process.
- An initial TDCP draft released for Board and community review by July 31, 2027.
- The final TDCP, a practical implementation framework, and a draft three-year Strategic Plan presented to the Board by September 30, 2027, subject to the consultant validated schedule and subsequent Board direction.

Objective 3: Modernize Architectural Standards and Covenants Rules

Purpose: Complete a comprehensive modernization of Tahoe Donner's Architectural Standards and Covenants Rules, including the standards governing compliance and enforcement to improve clarity, consistency, legal and regulatory alignment, usability, and support for Tahoe Donner's desired community character. Pair the rules update with process, technology, education, and implementation improvements that make requirements easier for members to understand, clarify how complaints are handled, refine compliance and enforcement mechanisms, and enable staff and committees to administer rules consistently. Complete the draft and begin Board review in late 2027, with possible authorization of the formal 45-Day Notice targeted for Q1 2028.

2027 Board Decisions and Deliverables

- Board direction on major policy choices and desired community character outcomes before substantial drafting.
- A complete draft Architectural Standards and Covenants Rules package presented for initial Board review in late 2027.
- Board direction on revisions needed to prepare the package for possible authorization of the formal 45-Day Notice and member comment period in Q1 2028.

Objective 4: Modernize Digital Services for Members and Staff

Purpose: Launch the Board-approved Digital Transformation initiative through two funded priorities: replacing the Finance software and revamping Tahoe Donner's website. This focused phase defers recruiting the authorized director, the enterprise-wide assessment, and developing a multi-year roadmap.

Expected 2027 Outcome: Complete the 2027 phases of both projects, excluding changes to the eStore, and use implementation experience to recommend the next phase of the broader initiative through the 2028 planning and budget process.

The Board will continue to monitor progress on the objective, with no major decisions or Board-level deliverables anticipated in 2027.

Objective 5: Sustain Member Enjoyment and Use of Amenities Through Year 3 Implementation of the Amenity Access Rule

Purpose: Complete the multi-year implementation plan and integrate the adopted Amenity Access Rule into annual amenity operations, budgeting, technology planning, reporting, and member service while preserving member priority, managing capacity, and supporting consistent service.



Expected 2027 Outcome: Complete the approved Year 3 work, substantially complete household validation, and transition the rule into routine annual operations and planning.

The Board will continue to monitor progress on the objective, with no major decisions or Board-level deliverables anticipated in 2027.