



north lake tahoe

Incline Village/Crystal Bay Visitors Bureau

To: IVCBVB Board of Directors
Fr: Andy Chapman
Date: 9/20/16

Re: Discussion and Assessment of CEO Performance Review

Per Chair Heather Bacon, attached are additional documents for our board meeting tomorrow. Agenda Item **XII: Discussion and Assessment of CEO Performance Review**. Included in this packet supplement is the combined board review ratings and comments (as prepared by Ava Hinojosa), Andy Chapman's CEO Self-Evaluation, and the March 15th 2016, Board Retreat Strategic Vision Discussion Summary.

ANNUAL PERFORMANCE EVALUATION – PRESIDENT/CEO
For Merit Pay

Evaluation Period: 2015-2016

CHECK the box that most closely describes how you rate the CEO for each performance expectation question below. The point value of each rating is in brackets ranging from 5 to 1.

(5) = Significantly Exceeds Standards and Expectations
(4) = Exceeds Standards and Expectations
(3) = Fully Meets Standards and Expectations
(2) = Needs Improvements
(1) = Performance is Inadequate

I. RELATIONS WITH THE BOARD		Section Average: 4.1	COMMENTS
A. Does the CEO maintain effective and open lines of communication with the Board as a body and with individual members?	4.0		<ol style="list-style-type: none"> 1. Andy communicates well with the Board and has often times reached out to me when issues present themselves. 2. Andy always returns calls/emails in a timely fashion.
B. Is the Board kept apprised of all ongoing and current situations involving the Organizations business?	3.8		<ol style="list-style-type: none"> 1. Andy keeps us apprised of all necessary facets of the organization. 2. It would have been better to hear about employee challenges from Andy prior to getting personal calls from former staff. Perhaps when there are internal challenges with staff in particular we should be given a heads-up so as not be caught off guard. Other than staff issues, he does a good job of keeping us up to date.
C. Does the CEO exercise sound judgment when advising the Board?	4.4		<ol style="list-style-type: none"> 1. In all cases that I am aware of. 2. Andy's years of experience has transformed his style into one that I can trust that is built on his hands-on insight.
II. PLANNING		Section Average: 4.2	COMMENTS
A. Does the CEO anticipate needs and recognize potential problems?	4.2		<ol style="list-style-type: none"> 1. Andy's experience enables him to be proactive in anticipation of possible challenging situations. 2. From day one, Andy's focus on our financial systems and opportunities was laser-sharp and continues to be so today.
B. Does the CEO propose effective solutions and provide alternatives to identified problems?	4.0		<ol style="list-style-type: none"> 1. Here again experience allows Andy to propose effective solutions to challenges as they arise. 2. The upgrades throughout the office and our systems are a good example of his vision to constantly improve our organization where it is needed.

C. In making decisions, does the CEO obtain the facts and consider the long – term implications?	4.5	<ol style="list-style-type: none"> 1. Andy meets the challenges by listening and acting based upon his experience and his consideration of the facts at hand. 2. I respect Andy for his ability to review challenges at hand, research alternatives and offer solutions.
D. Does the CEO provide Board with all information necessary to make decisions?	4.4	<ol style="list-style-type: none"> 1. The Board receives detailed information in a timely manner.
E. Does the CEO effectively set goals that adhere to and support Incline Village Crystal Bay Visitor's Bureau mission?	4.0	<ol style="list-style-type: none"> 1. Without a doubt. 2. Andy has presented a very aggressive list of goals for this next year. I suggest we review and prioritize as a group. 3. Local events, clubs and activities are important for building relationships.... However, keeping focus at a management level on building tourism and strategy/vision is critical both for long term success of the region and in supporting the local groups.
F. Has the CEO met the goals established by the board during this evaluation period?	4.0	<ol style="list-style-type: none"> 1. Andy has been able to grow into the position. This transition required patience and tact due to the fact that his predecessor was in place for so many years and was genuinely loved and appreciated by so many. 2. I do not recall an official 'list of goals' yet I know there have been many improvements. We should review the list and discuss with Andy during his public review.
III. ORGANIZATION SKILLS Section Average: 3.8 COMMENTS		
A. Does the CEO exhibit the ability to arrange work and efficiently apply resources?	3.8	<ol style="list-style-type: none"> 1. Andy seems to be well organized and follows through. 2. Although I am not familiar with Andy's daily work schedule, I do know that he represents us at perhaps (too) many meetings that require his presence.
B. Does the CEO make decisions when sufficient information is available and implement action when conditions are ripe for success?	4.4	<ol style="list-style-type: none"> 1. Every indication so far would seem to affirm this point. 2. The financial & systems improvements alone are impressive.

C. Does the CEO exhibit the ability to reach for effective and, when necessary, creative solutions?	4.0	<ol style="list-style-type: none"> 1. Yes, as could be exhibited in the initial year of the position. 2. I would like Andy to provide some examples of 'creative' solutions to finalize my opinion on this subject.
D. Does the CEO obtain the best possible end result for the money spent?	3.4	<ol style="list-style-type: none"> 1. Andy seems to be balance sheet oriented and is very good at analyzing a P&L.
E. Does the organization run smoothly, and is there adequate internal communication among staff and between staff and the CEO?	3.6	<ol style="list-style-type: none"> 1. Now that Andy has his team in place I would believe so. 2. I'd like to see us implement a confidential staff review process for next year to have a clearer idea of what his skills are as a mentor and leader. 3. Andy has been working to improve operations at the Visitor's Center. Since a decent percentage of staff is new, it's difficult to evaluate fully in this review period. However, he appears to be making great strides.

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how you rate the CEO for each (4) = Exceeds Standards and Expectations
performance expectation question below. The (3) = Fully Meets Standards and Expectations
point value of each rating is in brackets (2) = Needs Improvement
ranging from 5 to 1. (1) = Performance is Inadequate

IV. BUDGET / FINANCE		Section Average: 4.0	COMMENTS
A. Does the CEO adequately and accurately report and project the financial condition of the Agency in a timely manner?	4.4		<ol style="list-style-type: none"> 1. Once again Andy is very cognizant of the numbers. He has been able to institute changes that have improved our overall financial position and formulated safeguards that protect our assets.
B. Are management practices and policies designed to maintain a sound long-range financial position?	3.8		<ol style="list-style-type: none"> 1. Those management practices seem to be in place.
C. Does the CEO exhibit knowledge and understanding of available resources?	4.2		<ol style="list-style-type: none"> 1. Through Andy and his team we have been able to secure grants that benefit the organization.

D. Does the CEO suggest and pursue creative solutions to financial issues?	3.8	<div>1. Yes, but he is open minded as well.</div> <div>2. I would like Andy to provide some examples of ‘creative’ solutions to finalize my opinion on this subject.</div>
V. COMMUNICATIONS Section Average: 4.4		COMMENTS
A. Does the CEO provide timely, clear, and accurate communications with appropriate constituents?	4.2	<div>1. Andy’s has an excellent reputation as a true team player.</div>
B. Does the CEO communicate openly and effectively with the public?	4.0	<div>1. Andy is well-spoken and communicates well in all environments that I have witnessed.</div> <div>2. Andy’s has an excellent reputation as a true team player.</div>
C. Does the CEO foster positive relationships with outside agencies as a means of furthering the Organization objectives?	4.6	<div>1. Absolutely. Andy has reached out to various agencies and bureaus to enhance the IVCBVB presence and visibility.</div> <div>2. Andy’s commitment to enhance and strengthen business in the Reno/Tahoe area is reflected in his numerous positions on various key Boards in the tourism industry.</div>
D. Does the CEO make efforts to create and sustain positive relationships with partner agencies?	4.6	<div>1. As exhibited in the comment directly above.</div> <div>2. Andy’s commitment to enhance and strengthen business in the Reno/Tahoe area is reflected in his numerous positions on various key Boards in the tourism industry.</div>
E. Does the CEO project an image of the Organization that represents efficiency, integrity, and professionalism?	4.6	<div>1. I believe that the IVCBVB is viewed in a very positive light. While this was the case prior to Andy’s taking the CEO position it has steadily increased.</div> <div>2. I always hear great things about Andy’s representation of our own organization.</div>
VI. MANAGEMENT SKILLS Section Average: 3.8		COMMENTS
A. Does the CEO have the skills and ability to resolve conflicts that may arise amongst jurisdictions, agencies and other parties?	3.6	<div>1. Yes, with-in reason. At times outside challenges require outside mitigation.</div>
B. Does the CEO listen to and understand the positions and circumstances of others and communicate that understanding?	3.4	<div>1. As best can be expected. There are times when positions need to be challenged as well.</div> <div>2. My concerns with Andy’s management skills stem from former challenges. I look forward to seeing improvement in this subject now that he has his own team in place.</div>

C. Does the CEO exhibit resilience; i.e. maintains motivation and energy in spite of constant demands?	3.8	1. So far.
D. Does the CEO follow through in a timely manner on commitments and requests?	4.0	1. In all areas that I am familiar with.
E. Is the CEO proactive and flexible in addressing changing issues and situations?	4.0	1. Andy is flexible in this regard because he listens. He does not seem to be fixated on always being right.

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VII. LEADERSHIP		Section Average: 4.0	COMMENTS
A. Does the CEO inspire a shared vision and enlist staff and Board support?	3.8		1. I believe that Andy is a leader. Not every individual in such a position is a leader. I do believe that Staff and Board members are quite willing to follow Andy's lead.
B. Does the CEO seek opportunities to improve the Organization and pursue them?	4.0		1. I believe that this is something that one accomplishes over time so I would grade it as adequate for the time served.
C. Does the CEO enable others to act by creating an atmosphere of trust and collaboration?	3.8		1. Absolutely. Andy enables others to speak up and voice their opinions.
D. Does the CEO create standards of excellence and model the behavior?	4.0		1. So far.
E. Does the CEO conform to the high ethical standards of the profession?	4.6		1. To the best of my knowledge.
F. Does the CEO handle people well in difficult situations?	3.6		1. Yes, I believe this to be an area that Andy has worked on diligently.

**ANNUAL PERFORMANCE EVALUATION – PRESIDENT/CEO
For Merit Pay**

PART II

OBSERVATIONS

- 1) From my perspective the Incline Village Crystal Bay Visitors Bureau has been very fortunate to have Andy on board as CEO. He is well versed in industry practices and procedures and brings a confident yet non arrogant presence to the Board. His experience allows Andy to communicate with many players in the VCB field. Andy keeps a close eye on the legislative/political branch and is always attempting to insure that our bureau and the North Shore in general has a voice in the game while being vigilant of possible actions that might adversely affect our shareholders.
- 2) I noticed Andy's title is now "President" of the VCB and believe that belongs in the private sector? Other than that minor observation, I am delighted to have Andy as the leader of the VCB and representative for the entire organization throughout the region. He has done an excellent job to date.
- 3) Andy excels at building relationships with local and regional agencies and working with partners to deliver a marketing product that exceeds what we could accomplish as a smaller region. The information Andy provides to the Board is valuable and complete. He is measuring the correct metrics for stays, revenue, etc. Andy is strategic in his thinking. He is well respected amongst colleagues, other agencies and industry professionals. Andy has supported (through his relationships) large Tahoe wide events which brings recognition to the area. I am very pleased that Andy is the CEO of the IVCBVB and enjoy working with him. The improvements he has made in management for the bureau are refreshing and I feel confident in Andy's long term vision and execution. Andy's performance as CEO has exceeded my expectations to date. Keep it up!
- 4) Andy seems well educated for the position.
- 5) I believe that Andy has raised the bar for the Organization. He has really jumped in and looked at the procedures and systems and has made some strong changes that have been a benefit in the short term and the long term. I look forward to Andy and his team developing and implementing the various initiatives discussed at the annual retreat.

List in order of priority, the CEO's top strengths and areas of improvement to work on during the next evaluation period.

- 1) I believe that Andy's strengths are also the areas that he should strive to get even better at Experience, Organization, Communication, and Work Ethic.
- 2) Financial management- continues to refine systems and grow merchandise and concierge revenues. Organization representation – continue to be on top of the NLTRA sales initiatives in particular to ensure we are well represented in all capacities. Ditto the above with regard to the Abbi Agency activities.
- 3) (Repeated comments from last question) Andy excels at building relationships with local and regional agencies and working with partners to deliver a marketing product that exceeds what we could accomplish as a smaller region. The information Andy provides to the Board is valuable and complete. He is measuring the correct metrics for stays, revenue, etc. Andy is strategic in his thinking. He is well respected amongst colleagues, other agencies and industry professionals.

Regarding areas of improvement for next year, I believe it's important that Andy and the team keep a focus on the bigger picture for the region, i.e. building tourism, heads in beds, increasing length of stay, and bringing in additional revenue for our North Lake Tahoe Region. While an important element of building tourism and revenue for the North Tahoe area is supporting the guest experience with the Visitor's center via information, access to events and tickets, etc. it's important that the Visitor's Center team not become so focused on "increasing revenue" within the Center via tickets and merchandise that they spend their effort on that vs. supporting the bigger goals of marketing the region, encouraging trip reservations, supporting booking groups, etc. Merchandising revenue will not support the North Tahoe area like additional tourist night stays will. While admirable to build local revenue, it would be a shame to lose sight of the larger vision as Andy's strengths excel in that area. Andy is doing a tremendous job and I'd like to see that continue. I'd like to see additional support and advocacy from Andy with and for the properties in the Incline Village and Crystal Bay area in the group sales area. I believe an opportunity exists for our area to receive additional leads from the local group sales team, the FIT team and the RSCVA.

- 4) Seems open to new opportunities and direction.
- 5) Organization, Communication, Developing Partnerships within the Hospitality Community.

List in order of priority, board strengths and areas where the board members can improve during the next evaluation period.

- 1) Not sure what this has to do with Andy's evaluation so I will leave it blank.
- 2) Financial management- continue to refine systems and grow merchandise and concierge revenues
Organization representation – continue to be on top of the NLTRA sales initiatives in particular to ensure we are well represented in all capacities. Ditto the above with regard to the Abbi Agency activities.
- 3) This is tough to answer without knowing Andy's thoughts but one option would be for the Board to join Andy in some of his advocacy meetings with RSCVA, lead generation teams, etc. The strength of the Board is their passion for the area, the desire to see the North Tahoe region continue to thrive and grow and their willingness to support Andy and team's effort.
- 4) Commitment to the Organization.
- 5) No comment.



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Incline Village/Crystal Bay Visitors Bureau

Employee Self Evaluation

Employee's Name: Andy Chapman	Title: President/CEO
Department:	Date: 8/1/16

I. MAJOR ACCOMPLISHMENTS: Note below any activities and accomplishments completed during the evaluation period which you feel were of significant value and/or beyond the scope of your regular duties. This space can be used to comment on circumstances that may have affected your performance.

As discussed at our last Board meeting, it is appropriate to review the FY 2015/16 Fiscal Year. Although I have been in place as President/CEO since December 2014, the first 6 months of my tenure was basically continuing the programs and processes in place prior to my arrival. However, during this time period there were a number of procedures and policies that were implanted that continued through this past fiscal year. Those items have been included in this self-review.

Subsequent of my arrival and after a few months to assess the current operation, six key areas of focus were developed. These areas included Operational Efficiencies, Financial Accountability, Revenue Optimization, NLT Marketing Cooperative Program Management, Partnership Leverage and Opportunities and Legislative Advocacy. These will be the areas this self-review will focus on.

Operational Efficiencies

- Implemented a POS system to accurately track, manage and report on merchandise sales.
- Developed and implemented cash handling procedures to ensure timely tracking and deposits.
- Installed new employee work stations to maximize productivity.
- Redesigned retail store space for better utilization of limited area while continuing distribution of collateral materials and increasing sales per square foot opportunities.
- Hired new Operations and Finance Director.
- Automated payroll process with contracted vendor to increase reliability while decreasing associated staff time.
- Developed and hired new Business Development Manager to assist with Activity Tickets, Conference Sales and Leisure Sales programs and activities.
- Work closely with RSCVA Human Resources Director to ensure policy and procedure compatibility with state sister organization.
- Developed CEO Monthly reports to keep board members apprised of organizational information and projects.

Financial Accountability

- Implemented new accounting procedures and policies.
- Developed monthly accounting reports for board presentation.
- Moved bank accounts to US Bank for higher customer service and lower account expenses.
- Streamlined account receivable process for vendor payouts.
- Conducted organization financial audit for FY 2014/15.
- Developed and executed FY 2015/16 budget process with monthly tracking and reporting of revenues and expense.
- Developed FY 2016/17 revenue and expense budget for board approval.

Revenue Optimization

- Reviewed, analyzed and implement new customer merchandise program.
- Developed a Cost of Goods policy for merchandise sales to increase profitability.
- Increased vendor participation in Activity Ticket and Concierge program resulting in increased revenue sales.
- Increased commissionable percentage for Activity Tickets and Concierge programs.
- Developed Artist Loft as a mechanism to showcase local art while increasing sales opportunity through art sales.

NLT Marketing Cooperative Program Management

- With our partner organization hiring a tourism director replacement in January 2015, it was imperative for our efforts not to slip during the staffing transitions. As directed by the Board, my effort focused on the management of all our important NLT Coop programs which was critical to ensure the continued successes and oversight of our financial investment.
- Trained new NLTRA Tourism Director on NLT Coop programs.
- Activity involved in all NLT Coop program activities.
- Oversight of www.GoTahoeNorth.com website improvements and development.
- Launched new consumer website in June 2015.
- Hired new Business Development Manager to assist in NLT Cooperative programs in Conference and Leisure Sales.
- Increased Chicago Sales Representative's scope of work and program.
- Conducted Coop agency RFP process and new agency contracting project.
- Oversight of NLT Coop financial accounting and reporting.
- Worked closely with new NLTRA Finance Director on Coop financial process.

Partnership Leverage and Opportunities

- North Lake Tahoe Resort Association
 - Continued close relationship with cooperative partner during and beyond staff transition.
 - Developed key communication process with NLTRA staff members who work on behalf of the NLT Coop to ensure successful transition.
 - Work closely with NLT Coop vendors and agencies to ensure program implementation and success.
- Travel Nevada
 - Established strong relationship with our State Tourism Office.
 - Work closely with State Tourism Office departments to ensure the North Lake Tahoe message and product attributes are being included in State's marketing efforts.
 - Successfully applied for numerous Travel Nevada grants for both marketing program and tourism infrastructure needs.
- RSCVA
 - Established strong relationship with RSCVA executive team and marketing teams.
 - Attend RSCVA board and departmental meetings to ensure the North Lake Tahoe product is being marketed accurately.
 - Work closely with RSCVA financial department on revenue expectation and forecasting.
- Visit California
 - Remain active on the Visit California Marketing committee as well as the Brand and Content Committee to ensure the North Lake Tahoe message is being included in the State's marketing efforts.
- Reno Tahoe Territory
 - Sit on Executive DMO Committee for Reno Tahoe Territory (one of 5 territory designation with Travel Nevada)
- IVGID
 - Establish a good working relationship with IVGID management and supervisory staff

related to common projects and efforts.

- ICBA
 - Working with ICBA to ensure active and effective coordination with other business associations on the California side of North Lake Tahoe.

Legislative Advocacy

- Worked with board members and legal counsel on Lodging Surcharge authored by the Nevada Resort Association. We were successful in removing the IVCB area from the surcharge bill.
- Followed the Fitted Sheets legislation for any potential impacts.
- Developing a legislative platform for FY 2016/17.

II. PERFORMANCE DEVELOPMENT: List areas where you feel performance improvement may be warranted, with suggestions of specific activities that you might undertake.

1. Focus on staff growth and development with specific and targeted training opportunities.
2. Increase interaction with local business while developing business outreach programs to create strong partnerships.
3. Increase oversight responsibilities within the NLT Coop to assist with program execution and to ensure effective utilization of IVCBVB funding contribution.
4. Develop strong relationship with new RSCVA executive team once new CEO is in place.

III. UPCOMING GOALS: What do you hope to achieve in your job for the upcoming year that could be considered by you and your supervisor as specific goals and objectives for the year?

Based on discussions at the March Board retreat, the following areas will be focused on for the next five years. Specific annual plans will be developed with input from the board in support of these initiatives.

1. Marketing: Keep Focused on being a "Destination" and Ability to Quantify Marketing Success. Continue and enhance North Lake Tahoe Marketing Cooperative relationship.
 - a. Maintain Core Markets
 - i. Leverage other \$\$ opportunities
 - ii. Leverage regional partnerships
 - b. Develop and Support Emerging Markets
 - i. Capitalize on regional growth
 - ii. Enhanced and viable asset to national and international tourism efforts
 - c. Year Round Focus
 - i. Continue to focus on "year round" opportunities
 - ii. Expanded focus on Spring/Fall travel period
 - iii. Clearly defined and recognized year round destination vs "country club community"
2. Special Events
 - a. Enhance participation and support of special events
 - b. Pursue targeted event sponsorships
 - c. Identify available resource allocation
3. Enhance Visitor Assets
 - a. Transportation Enhancements
 - i. Transportation integrated with North shore brand
 - ii. Trailhead connectivity with transportation assets
 - iii. Successful transit system with extended Night Rider service
 - iv. Integration with regional transit marketing efforts
 - b. Diamond Peak Master Plan
 - i. Support for increased visitor assets associated with DP Master Plan
 - c. Community Assets for Visitor Use
 - i. Define and promote beach access policies

- ii. Promotion of IVCB activity trail systems
- d. Visitor/Welcome Center
 - i. Create “one stop shop” for diverse visitor and local needs
 - ii. Grow center revenues
 - iii. Create immersive guest experience
- 4. Political Strategy
 - a. Legislative Advocacy
 - i. Develop a defined platform
 - ii. Focused effort on legislative relationships
 - iii. Increased transit funding (RTC)
 - iv. Support of visitor-servicing infrastructure enhancements
 - b. Business Advocacy
 - i. Convener of community partnerships (IVGID, ICBA)
 - ii. Increased community grant opportunities
 - c. True Integration of Incline Village & Crystal Bay Communities
 - i. Provide support and leadership in community focused efforts
- 5. Financial Performance
 - a. Accurate financial reporting/accountability
 - b. Developed efforts on financial sustainability
 - c. Protect reserve funds
 - d. Grow non-TOT funds
 - e. Leverage partner \$\$

Employee's Signature:

Print Name:

Date:

Supervisor's Signature:

Print Name:

Date:

IVCBVB Board Retreat
March 15th, 2016

Board Strategic Visioning Discussion Summary

Primary Focus Areas

1. **Marketing:** Keep Focused on being a “Destination” and Ability to Quantify Marketing Success. Continue and enhance North Lake Tahoe Marketing Cooperative relationship.
 - a. Maintain Core Markets
 - i. Leverage other \$\$ opportunities
 - ii. Leverage regional partnerships
 - b. Develop and Support Emerging Markets
 - i. Capitalize on regional growth
 1. Domestic and regional air lift
 - ii. Enhanced and viable asset to national and international tourism efforts
 - c. Year Round Focus
 - i. Continue to focus on “year round” opportunities
 - ii. Expanded focus on Spring/Fall travel period
 - iii. Clearly defined and recognized year round destination vs “country club community”
2. **Special Events**
 - a. Enhance participation and support of special events
 - b. Pursue targeted event sponsorships
 - c. Identify available resource allocation
3. **Enhance Visitor Assets**
 - a. Transportation Enhancements
 - i. Transportation integrated with North shore brand
 - ii. Trailhead connectivity with transportation assets
 - iii. Successful transit system with extended Night Rider service
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 - d. Visitor/Welcome Center
 - i. Create “one stop shop” for diverse visitor and local needs
 - ii. Grow center revenues
 - iii. Create immersive guest experience (Jackson Hole model”

4. Political Strategy

- a. Legislative Advocacy
 - i. Develop a defined platform
 - ii. Focused effort on legislative relationships
 - iii. Increased transit funding (RTC)
 - iv. Support of visitor-servicing infrastructure enhancements
- b. Business Advocacy
 - i. Convener of community partnerships (IVGID, ICBA)
 - ii. Increased community grant opportunities
- c. True Integration of Incline Village & Crystal Bay Communities
 - i. Provide support and leadership in community focused efforts

5. Financial Performance

- a. Accurate financial reporting/accountability
- b. Developed efforts on financial sustainability
- c. Protect reserve funds
- d. Grow non-TOT funds
- e. Leverage partner \$\$