

2026 Tellico Village POA BSC & Business Plan



2026 Tellico Village POA BSC & Business Plan

AGENDA:

1. Brief Tellico Village business plan history
2. Brief 2nd overview of TVPOA 2026 Balanced Scorecard:
 - What is a Balanced Scorecard (BSC)?
 - How does a BSC help an organization?
 - Brief overview of TVPOA 2026 Balanced Scorecard.
3. Overview of 1st draft TVPOA 2026 PDCA business plan:
 - What is a Plan Do Check Act (PDCA) business plan?
 - How does a PDCA help an organization?
 - Overview of TVPOA 1st draft business plan 14 PDCAs.

2026 Tellico Village POA BSC & Business Plan

AGENDA:

1. Brief Tellico Village business plan history

2026 Tellico Village POA BSC & Business Plan

Tellico Village 2024

1. November 9, 2023 Budget meeting
(1 hour 26 minutes and 30 seconds)
2. Request for Business Plan

Tellico Village 2025 Business Planning Process (3 STEPS)

STEP 1

Develop Department SWOT

STEP 2

Business Plan Development:

1. Develop Department Objectives
2. Develop SMART plans for each Objective
3. Develop PDCA Powerpoint Slide(s) for each Objective

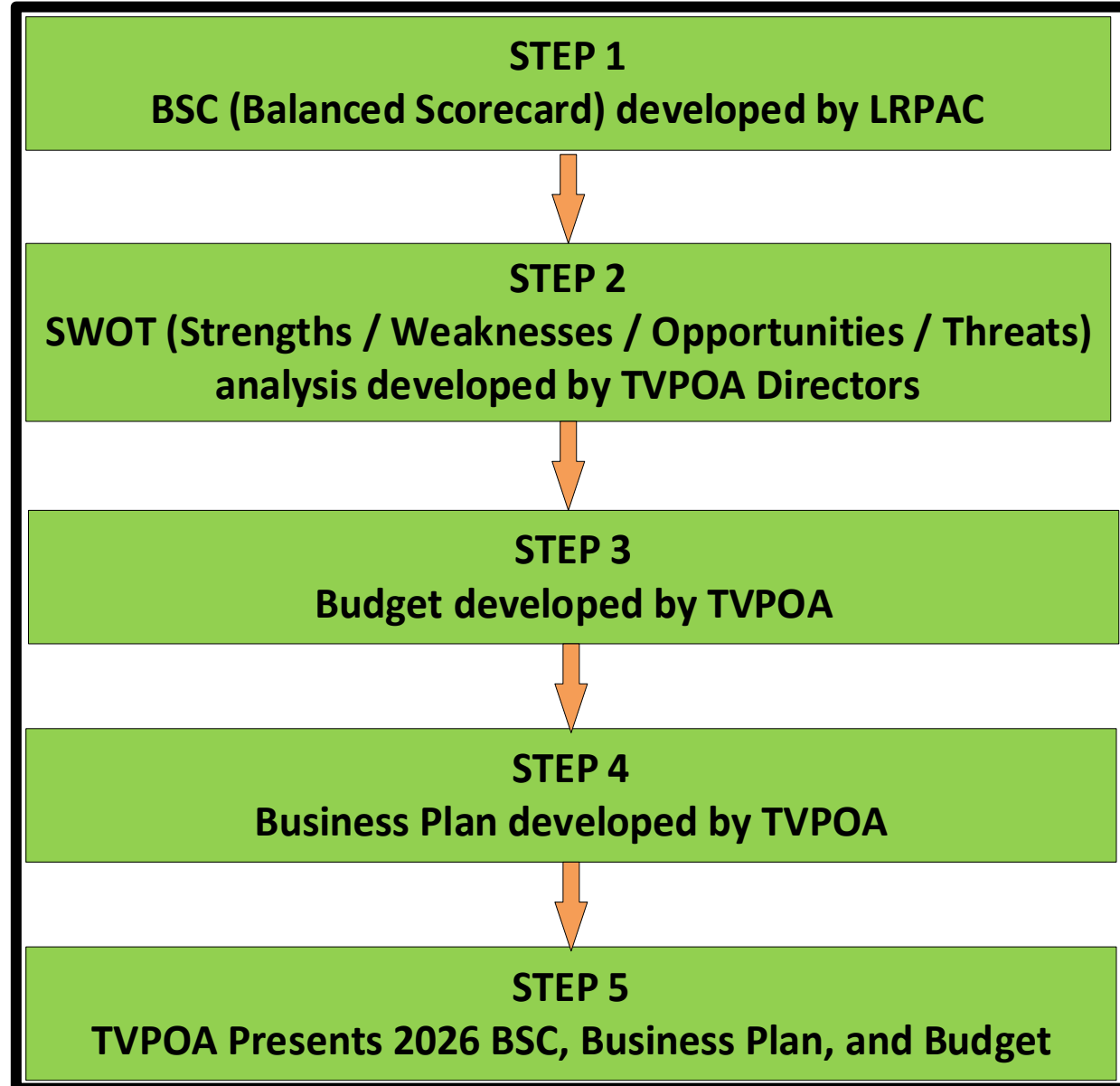
STEP 3

Develop Department Budget

2026 Tellico Village POA BSC & Business Plan

Tellico Village 2025

Move from 3 step to 5
step business
planning process



2026 Tellico Village POA BSC & Business Plan

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2026 Tellico Village POA BSC & Business Plan

What is a Balanced Scorecard?

- It is a strategic management system that allows an organization to manage strategy and improve performance
- Helps communicate to all the employees what the organization is trying to accomplish
- Looks at more strategic measures in addition to financial measures to get a more balanced view of performance
- Looks at 4 strategic measures, namely:
 1. Customer
 2. Financial
 3. Internal Processes
 4. Employee learning and growth

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2026 Tellico Village POA BSC & Business Plan

AGENDA:

How does a BSC help an organization?

- Focuses on improving processes resulting in improved efficiency by removing waste
- Aligns everyone's work prioritizing on "Big Rocks" (what's most important) to ensure everyone is rowing in the same direction
- Measure & monitor progress towards strategic targets
 - *We treasure what we measure*
 - *People react to what you **inspect**, not expect*

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TELLICO VILLAGE BALANCED SCORECARD



VISION *To be a dynamic, engaging community, meeting the changing needs of property owners, in a fiscally responsible manner, resulting in a lifetime of wellbeing.*

MISSION *To enhance and preserve the Tellico Village quality of life, social fabric, property values, and overall member value through effective and efficient management of the Association.*

	STRATEGIC OBJECTIVES			MEASURES	TARGETS	INITIATIVES
CUSTOMER		Establish periodic general customer satisfaction surveys	By April '26 establish and implement monthly Customer Satisfaction (CS) survey. Report results monthly while establishing CS baseline.	#1 CS PDCA		
		Customer service/experience follow-up survey (excluding HelpSpot)	85% Satisfied/Very Satisfied Methodology is Key Benchmark in '26	#2 Customer Experience Satisfaction PDCA		
		HelpSpot Satisfaction	85% Satisfied or Very Satisfied	#3 HelpSpot PDCA		
FINANCIAL		Achieve expenses per budget	TBD	#4 Expense PDCA		
		Meet revenue targets including manage subsidies by increasing non-assessment revenue	TBD	#5 Revenue & Subsidy PDCA		
		Monitor TV Financial Health	TBD (Meeting Reserve contribution goals)	#6 Reserve Contribution		
INTERNAL PROCESS		Identify Process Efficiency Improvements	Complete 3 efficiency studies identifying \$50K savings each*	#7 Efficiency PDCA		
		Establish Preventative Maintenance (PM) program	By May '26 establish PM programs for assets >\$50K & remaining life <30 years	#8 PM PDCA		
		Innovate discretionary revenue enhancing programs	New programs generate \$250K net new revenue growth*	#9 Innovation PDCA		
		Safety / Incident rate (OSHA cases) LTIR (Lost Time Incident Rate)	5.5	#10 Safety PDCA		
LEARNING & GROWTH		Establish annual employee satisfaction survey	Establish and implement annual employee satisfaction survey. Report results while establishing employee baseline for the % of employees that would recommend TV for employment	#11 Employee Satisfaction PDCA		
		Implement customer focused training	100% of employees trained online by year end	#12 Customer Focused PDCA		
		Employee retention	Voluntary separation: Food Service <TBD%; all others <TBD%	#13 Employee Retention PDCA		
		Establish performance reviews linked to Balanced Scorecard goals	100% of employees will have goals with some linkage to Strategic Objectives	#14 Align Reviews PDCA		
VALUES	People	Service	Communication	Fiscal Responsibility	Aesthetics & Environment	

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CUSTOMER	Put Customers First		Achieve High Property Owner Satisfaction	Establish periodic general customer satisfaction surveys	By April '26 establish and implement monthly Customer Satisfaction (CS) survey. Report results monthly while establishing CS baseline.	#1 CS PDCA
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FINANCIAL	Control Costs		Optimize Discretionary Revenue	Achieve expenses per budget	TBD	#4 Expense PDCA
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INTERNAL PROCESS	Improve Operational Efficiency	Maintain High Quality, Reliable Infrastructure	Innovate Amenities & Customer Services	Identify Process Efficiency Improvements	Complete 3 efficiency studies identifying \$50K savings each*	#7 Efficiency PDCA
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LEARNING & GROWTH	Increase Employee Skills & Empowerment	Improve Employee Satisfaction & Retention	Link Employee Goals to Scorecard	Establish annual employee satisfaction survey	Establish and implement annual employee satisfaction survey. Report results while establishing employee baseline for the % of employees that would recommend TV for employment	#11 Employee Satisfaction PDCA
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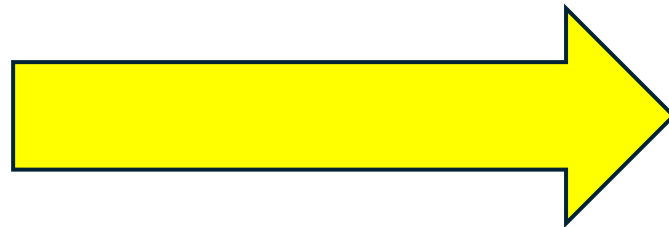
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What is a Plan Do Check Act (PDCA) business plan?

- A continuous (loop) improvement process that allows an organization to improve the work that we do
- Plan-Do-Check-Act (PDCA) a four-step, business management method used for business planning, continuous process improvement and problem-solving.



Known as the
“Deming Circle”

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AGENDA:

How does a PDCA help an organization?

- PLAN – Design or revise a business process to improve results
- DO – Implement the plan and test it's performance
- CHECK – Assess the measurements & report the results. If below plan, determine root cause
- ACT – If successful, standardize the process
 - If unsuccessful, adjust plan with root cause countermeasure(s), predict improvement results and test revised plan performance

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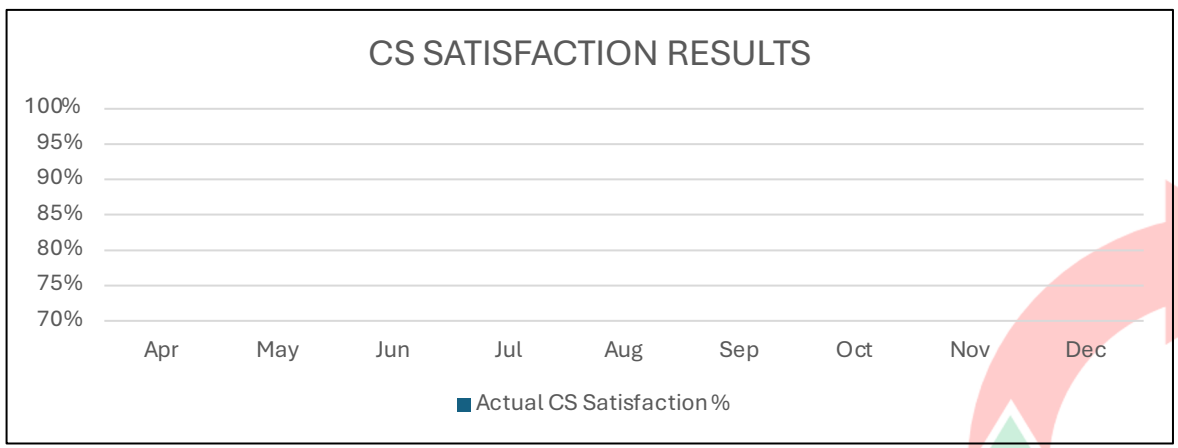
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ACT

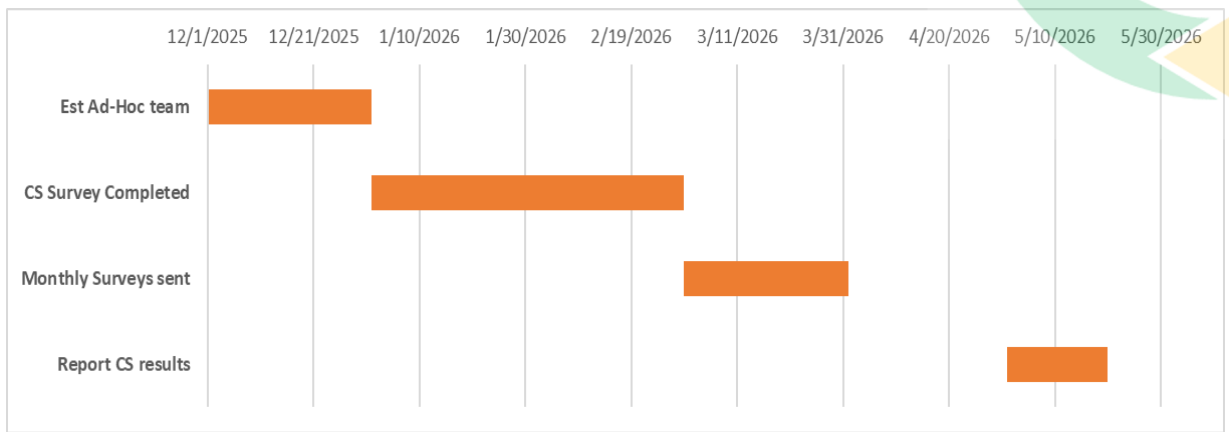
PLAN



- Establish Ad-Hoc CS Committee
- Survey completed
- Mail 50 unique residents/month
- Report CS results monthly at BOD meetings

CHECK

DO

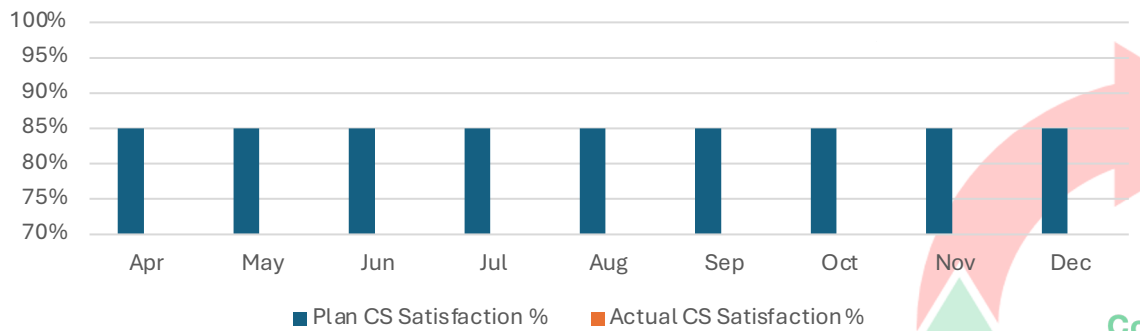


Continuous Improvement

- BOD gets CS Survey team volunteers 1/1/26
- CS Survey team develops POA survey 3/1/26
- CS team presents survey at March Town Hall 3/12/26
- Monthly survey sent to 50 TV residents in April 4/1/26
- Monthly surveys received and summarized for initial report at May BOD meeting 5/20/26

ACT Countermeasure(s): Expected Results:
 Required if YTD Insert planned recovery graph(s)
 results fall below plan

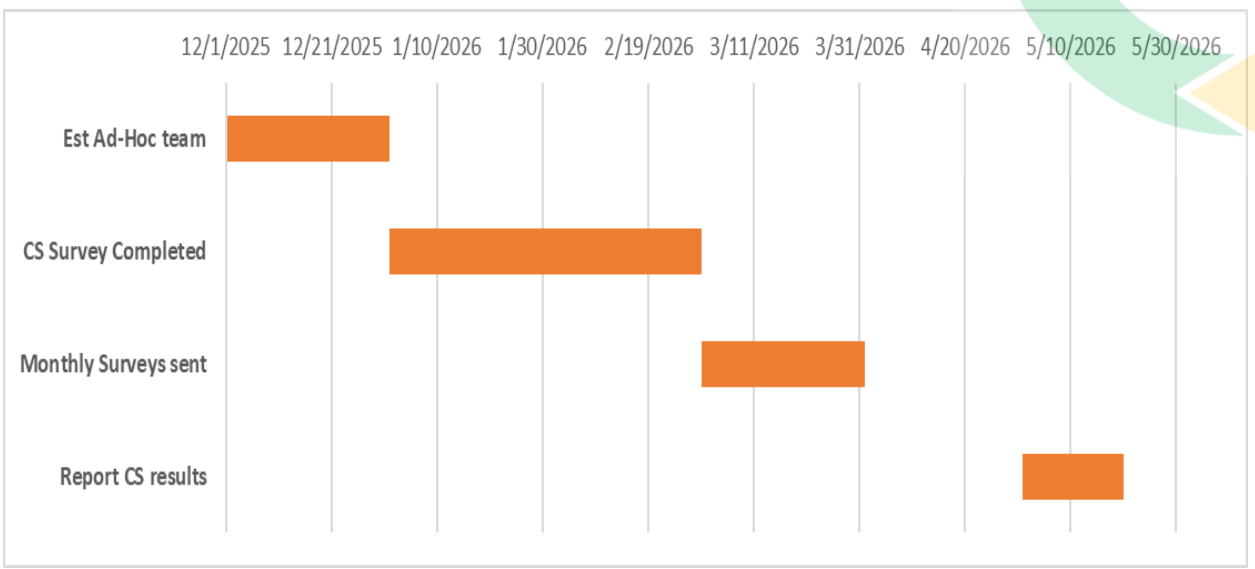
CUSTOMER EXPERIENCE SATISFACTION RESULTS



- PLAN**
- Establish Ad-Hoc CS Committee
 - CS Committee creates customer experience survey with planned 85% satisfaction target
 - CS Committee sets-up for PW, FS, Golf, Rec, & POA office
 - CS Committee picks up surveys
 - CS Committee summarizes survey results
 - GM reports CS results monthly at BOD meetings

Continuous Improvement

CHECK



DO

- BOD gets CS Committee volunteers 1/1/26
- CS Committee develops survey process including all tangible by end of February 2/27/26
- CS Committee presents survey at February Town Hall 3/13/26
- CS Committee collects surveys and summarizes for April BOD meeting 4/10/26
- GM reports results at monthly BOD meeting 4/15/26

ACT

PLAN

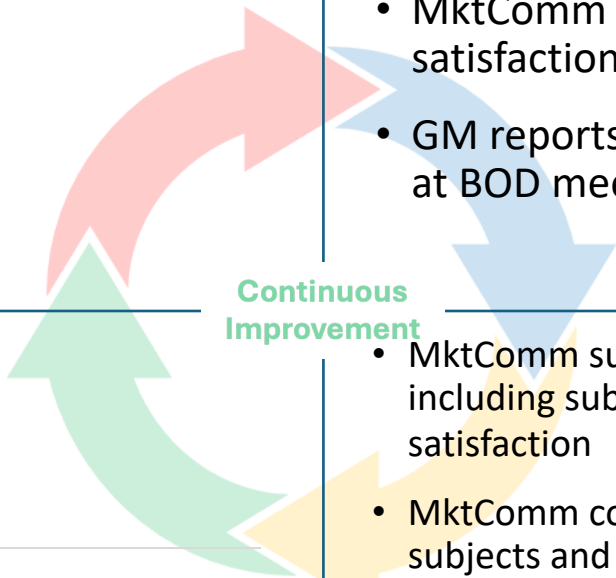
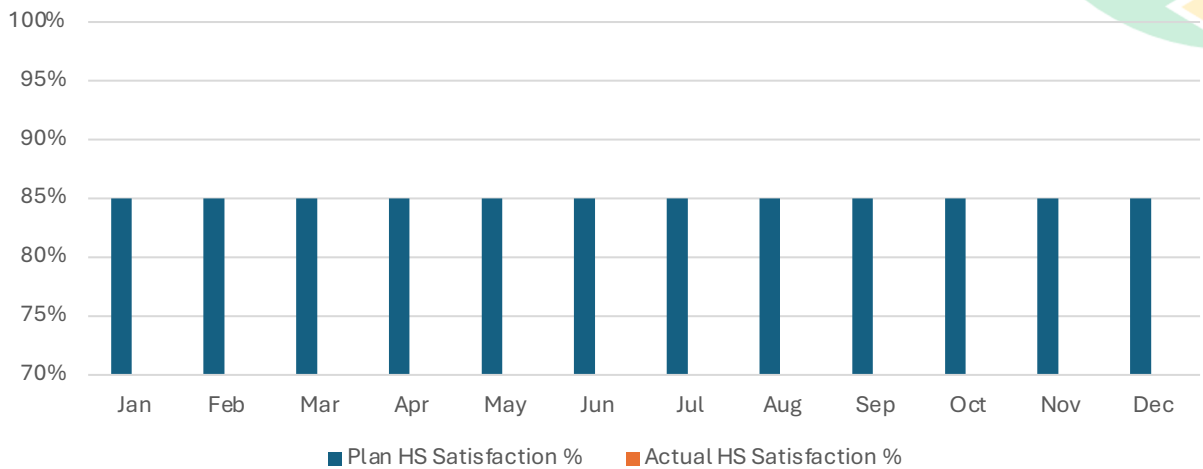
Countermeasure(s):
Required if YTD results fall below plan

Expected Results:
Insert planned recovery graph(s)

- MktComm reviews HelpSpot 85% satisfaction target, 2025 HelpSpot actual results and new HelpSpot process at Directors meeting
- MktComm calculates HelpSpot monthly actual satisfaction results vs planned 85% satisfaction target
- GM reports HelpSpot satisfaction results monthly at BOD meetings

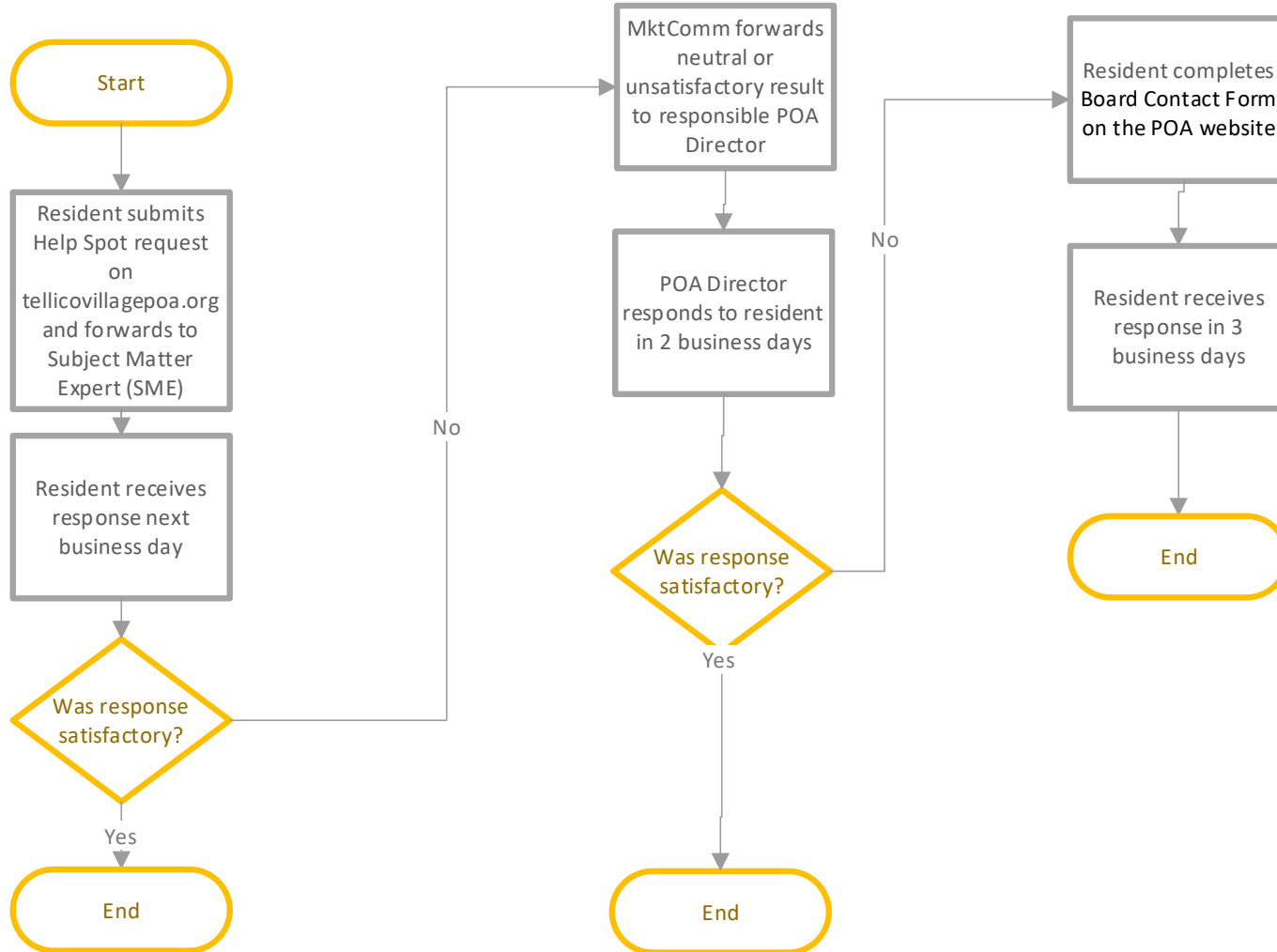
CHECK

HELPSPOT SATISFACTION RESULTS



- MktComm summarizes 2025 HelpSpot results, including subjects and departments with lowest satisfaction 1/5/26 **DO**
- MktComm communicates the lowest satisfaction subjects and departments to all Directors @ monthly meeting 1/6/26
- Directors to share lowest satisfaction subjects with all employees and ask for their help with improving HelpSpot satisfaction 1/9/26
- MktComm calculates HelpSpot results based on 1st response overall POA (BSC score) plus internal by department satisfaction actual results monthly 2/4/26
- GM reports HelpSpot results at monthly BOD meeting 2/18/26

Tellico Village Help Spot Flow Chart



ACT

Countermeasure(s):
 Required if MTD/YTD results fall 10%/\$10K
 outside of plan

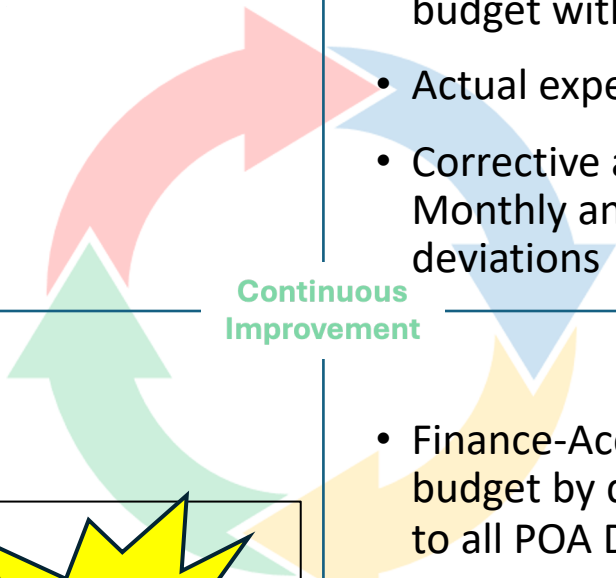
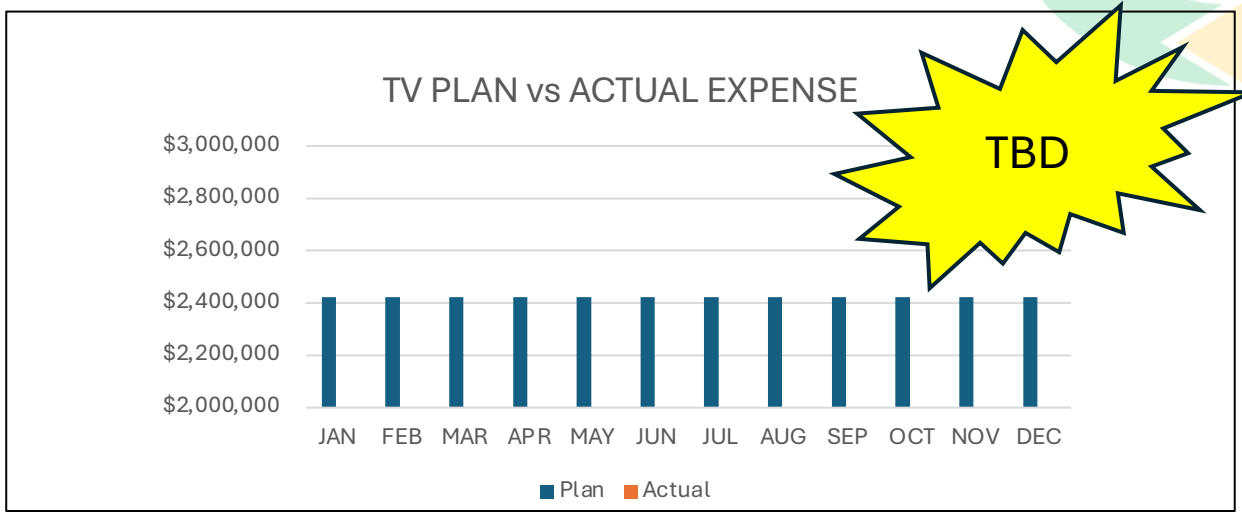
Expected Results:
 Insert planned recovery graph(s)

PLAN

- Create monthly planned expense budget reports by department and TOTAL
- Each department shares planned monthly expense budget with all employees
- Actual expense budget reports are prepared monthly
- Corrective action plans are developed for significant Monthly and/or Year-to-Date (YTD) expense overage deviations

CHECK

DO



- Finance-Acct prepares monthly planned expense budget by department and TOTAL then forwards to all POA Directors 12/23/25
- POA Directors share monthly planned expense budget results with all employees 1/9/26
- Finance-Acct creates monthly reports showing planned vs actual results 2/13/26
- POA Directors share monthly planned vs actual expense results and corrective action for deviations greater than \$10,000 or 10% 2/18/26

ACT

PLAN

Countermeasure(s):
Required if MTD/YTD results fall above/below plan

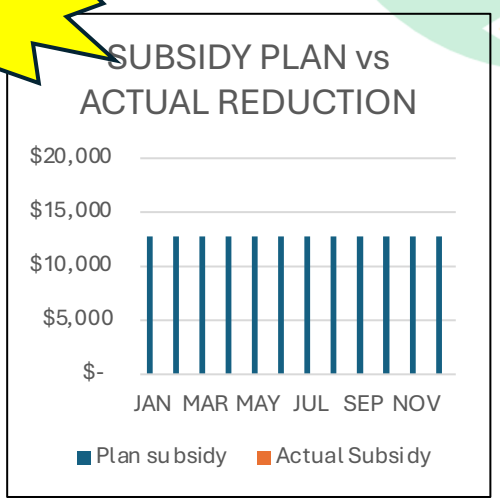
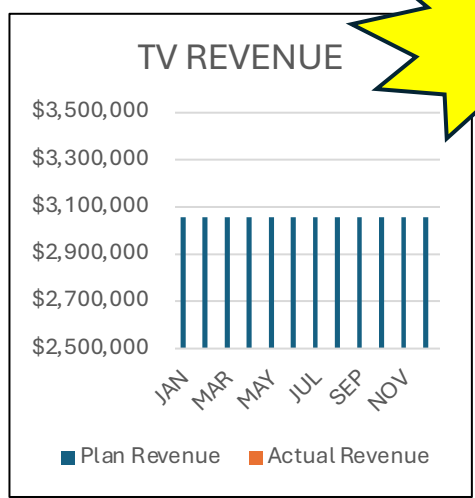
Expected Results:
Insert planned recovery graph(s)

- Create monthly planned revenue increase & subsidy reduction budget reports by department and TOTAL
- Each department shares planned monthly revenue increase & subsidy reduction budget with all employees
- Actual revenue increase & subsidy reduction budget reports are prepared monthly
- Corrective action plans are developed for significant Monthly and/or Year-to-Date (YTD) revenue increase & subsidy reduction deviations

Continuous Improvement

CHECK

DO



- Finance-Acct prepares monthly planned revenue 12/23/25 increase & subsidy reduction budget by department and forwards to all affected POA Directors
- POA Directors share monthly planned revenue increase & subsidy reduction budget with all employees 1/9/26
- Finance-Acct creates monthly reports showing planned vs actual results 2/13/26
- POA Directors share monthly planned vs actual revenue increase & subsidy reduction results and corrective action for deviations greater than \$10,000 or 10% 2/18/26

ACT

Countermeasure(s):
 Required if MTD/YTD results fall 10% below plan

Expected Results:
 Insert planned recovery graph(s)

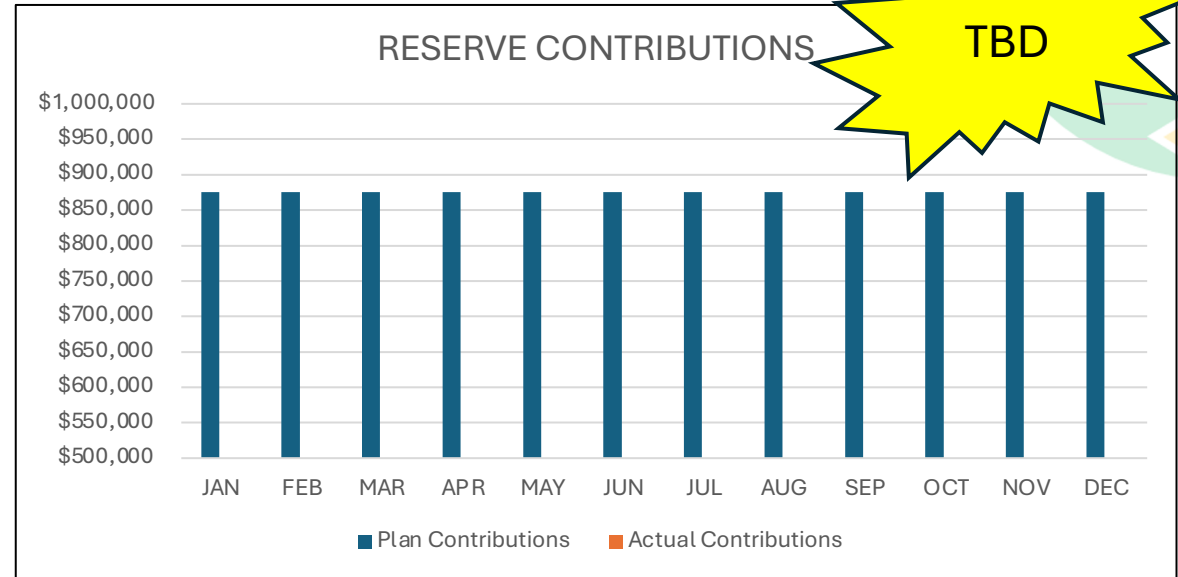
PLAN

- Determine required reserve contribution targets
- Set rates for 2026 to achieve reserve funding goals based on reserve study, including water and sewer rates
- Create monthly planned reserve contribution budget report
- Share monthly reserve contribution targets with all employees
- Actual reserve contribution plan vs actual results are prepared monthly
- Corrective action plans are developed for significant monthly and/or Year-to-Date (YTD) deviations

Continuous Improvement



CHECK



DO

- Finance-Acct calculates & gets BOD approval for 2026 reserve contribution amounts 11/19/25
- Finance-Acct prepares monthly planned reserve contribution budget and forwards to all Directors 12/23/25
- Directors share monthly planned expense budget with all employees 1/9/26
- Finance-Acct creates monthly reports showing planned vs actual results 2/13/26
- Directors share monthly vs actual expense results and corrective action for deviations greater than 10% 2/18/26

ACT

Countermeasure(s):

Required if MTD/YTD results fall below plan

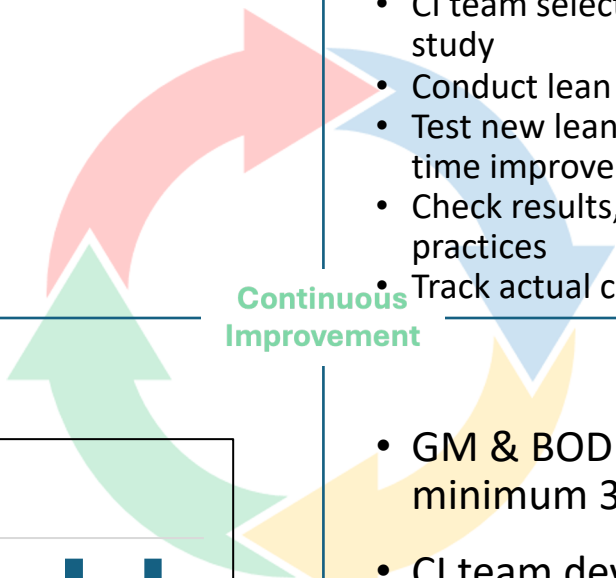
Expected Results:

Insert planned recovery graph(s)

PLAN

- Establish Ad-Hoc Continuous Improvement (CI) team to partner with POA to map out the current processes looking for lean efficiency improvements
- Determine minimum of 3 processes for CI process efficiency studies to achieve \$150,000 in annualized net savings
- Develop schedule for conducting lean CI process efficiency improvements for 2026
- CI team select lean best process / quality circle for performing efficiency study
- Conduct lean CI efficiency process per schedule
- Test new lean process improvements and test for quality, cost and cycle time improvements
- Check results, adjust as necessary, and document new lean best practices
- Track actual cost improvement savings and report monthly

Continuous Improvement

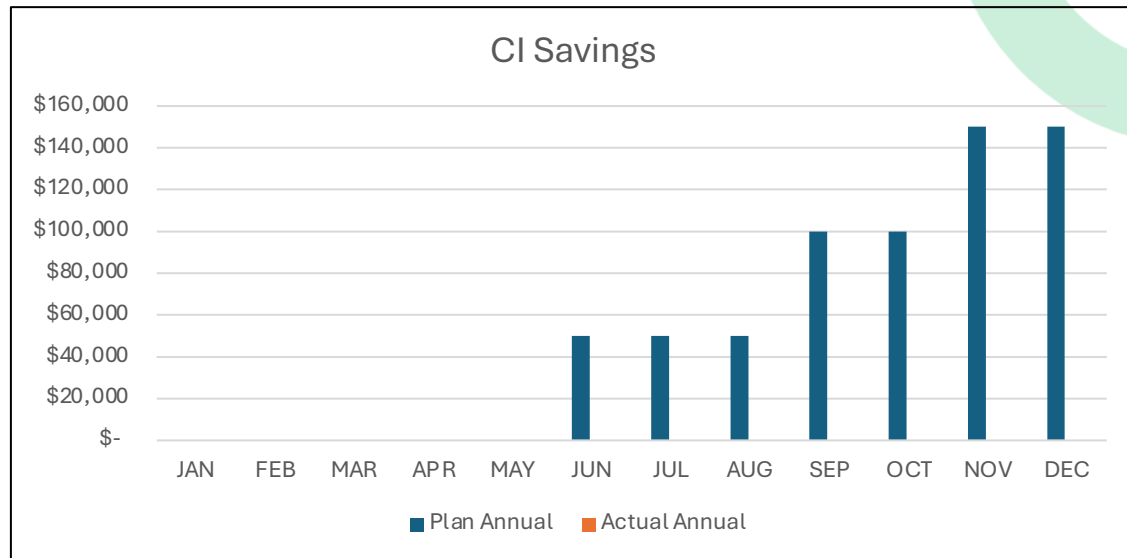


DO

- GM & BOD establish volunteer CI team plus minimum 3 processes for study 1/16/26
- CI team develops CI schedule, lean process and presents at March BOD meeting 3/18/26
- CI team updates PDCA deck monthly the 2nd Friday of every month showing project progress plus results 4/10/26

CHECK

CI Savings



ACT

Countermeasure(s):
Required if YTD results fall below plan

Expected Results:
Insert planned recovery graph(s)

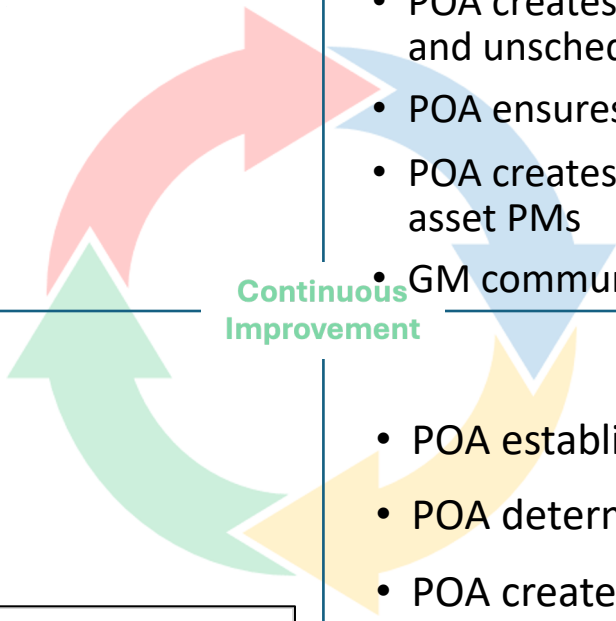
PLAN

- POA establishes a list of assets (building, vehicle, equipment, etc.) for Preventative Maintenance (PM) program
- POA determines maint. Task, description, and frequency based on Original Equipment Manufactures (OEM) recommended maintenance intervals and own maintenance history for every asset
- POA creates PM checklist or matrix to plan and track actual PM and unscheduled repairs
- POA ensures they have capable and dedicated PM team
- POA creates PM Standard Operation Procedures (SOP) for all asset PMs
- GM communicates to all POA staff and TV residents

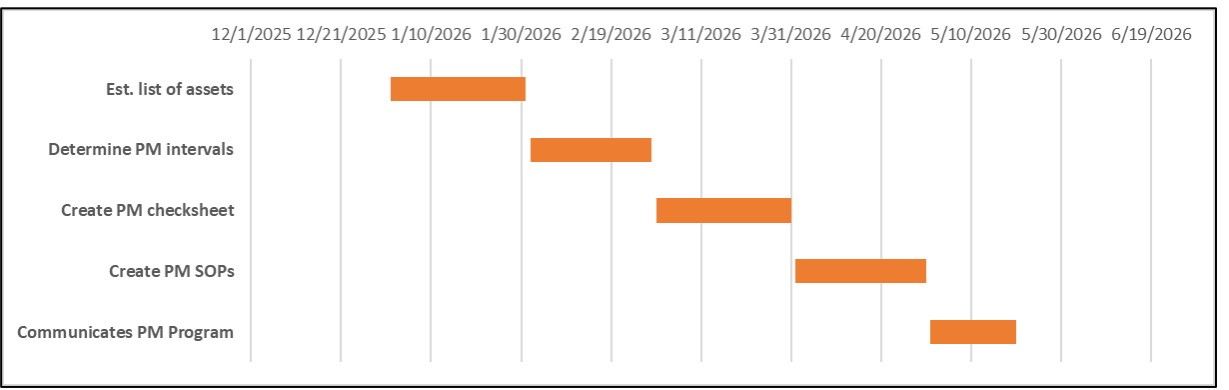
CHECK

DO

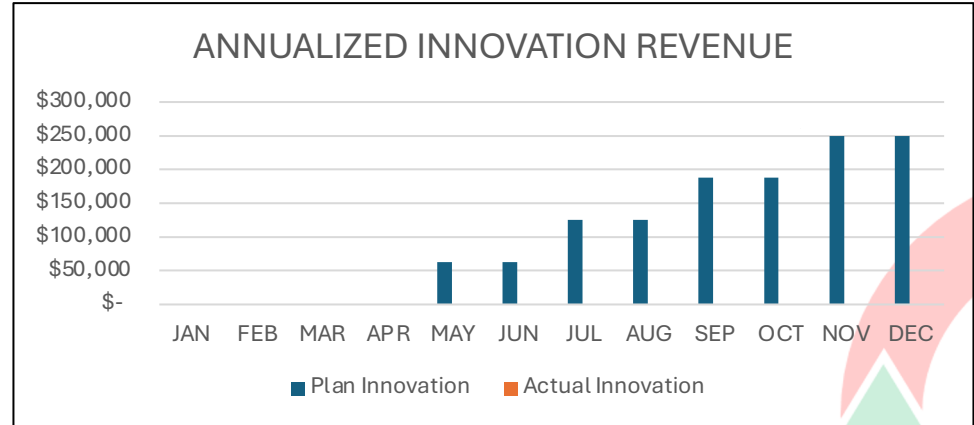
Continuous Improvement



- POA establishes a list of assets for PM program 1/31/26
- POA determines PM intervals for every asset 2/28/26
- POA creates PM checklist or matrix and ensures they have capable and dedicated PM team 3/31/26
- POA creates PM Standard Operation Procedures for all asset PMs 4/30/26
- GM communicates to all POA staff and TV residents 5/20/26



ACT Countermeasure(s):
 Required if YTD results fall below plan
 Expected Results:
 Insert planned recovery graph(s)

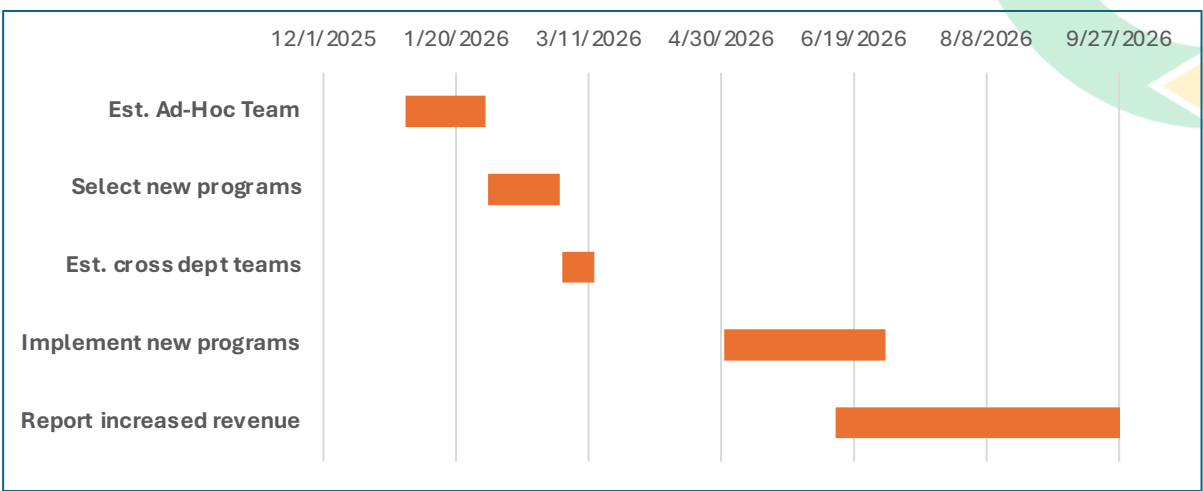


PLAN

- Establish Ad-Hoc POA revenue team to innovate discretionary revenue enhancing programs
- Brainstorm multiple discretionary revenue enhancing programs
- Rank the feasibility of success for each program including estimated net revenue target
- Select 4 program(s) that each will meet or exceed \$62,500 in net increased revenue
- Engage Directors to assign Ad-Hoc cross department employees to create PDCAs for each new program
- Implement and test new programs checking for net cost improvement and customer satisfaction
- Adjust program as necessary and standardize or pursue new innovation idea
- Report annualized net revenue dollars and track actuals monthly

Continuous Improvement

CHECK



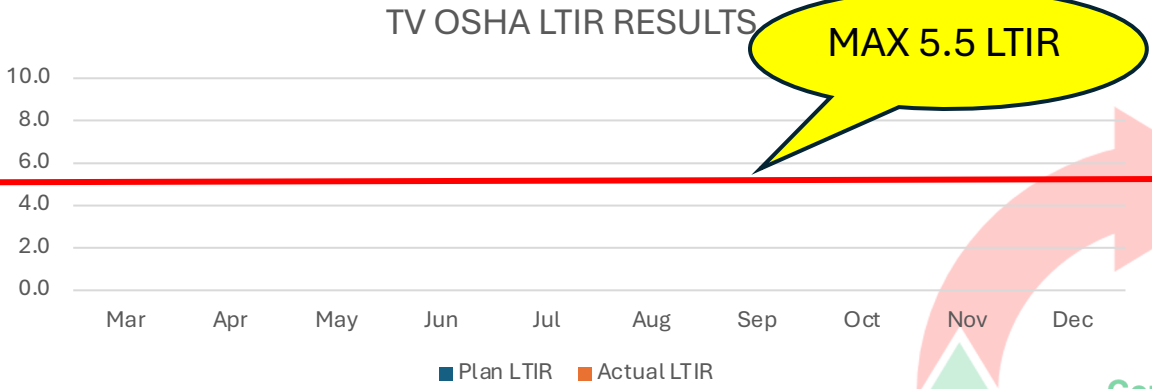
DO

- Establish Ad-Hoc Revenue team 1/30/26
- Brainstorm, rank & select new revenue enhancing programs 2/28/26
- Engage Directors to assign Ad-Hoc teams to create PDCAs for each new program 3/13/26
- Implement & test new programs checking for net cost improvement and customer satisfaction 5/1/26 – 7/1/26
- Report annualized net revenue dollars for each new program 6/12/26
- Track actual savings & adjust programs as necessary and standardize or pursue new innovation idea 7/1/26

ACT

Countermeasure(s):
Required if YTD results fall below plan

Expected Results:
Insert planned recovery graph(s)

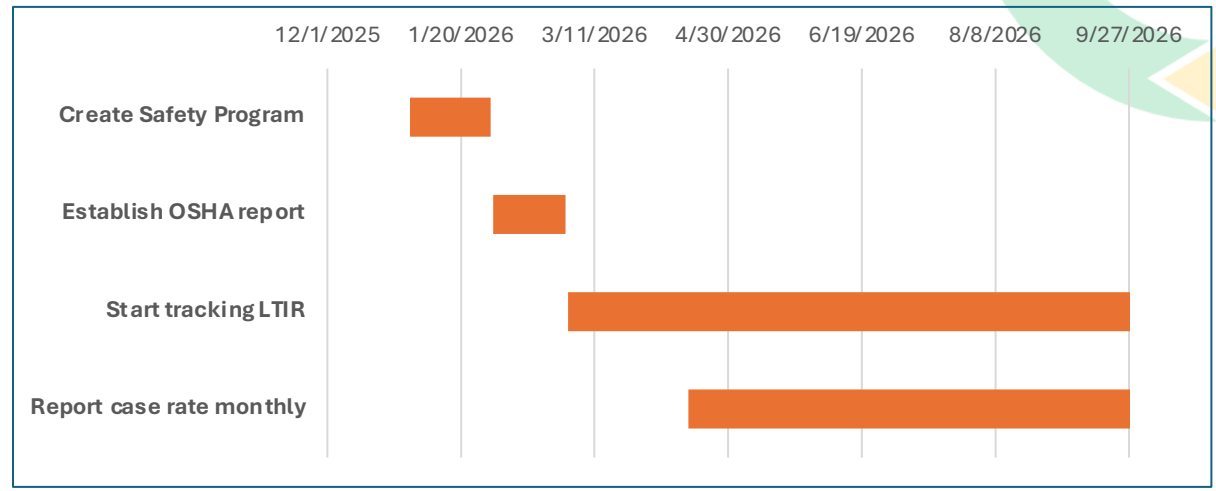


PLAN

- Create safety program while ensuring all employees have Personal Protective Equipment (PPE)
- Create tracking and reporting mechanism for Safety/Incident Rate (OSHA cases) based on LTIR (Lost Time Incident Rate)
- Report LTIR monthly

Continuous Improvement

CHECK



DO

- HR Creates safety program 1/30/26
- HR establishes tracking and reporting mechanism for Safety/Incident Rate (OSHA cases) based on LTIR (Lost Time Incident Rate) 2/28/26
- GM reports LTIR monthly 4/15/26

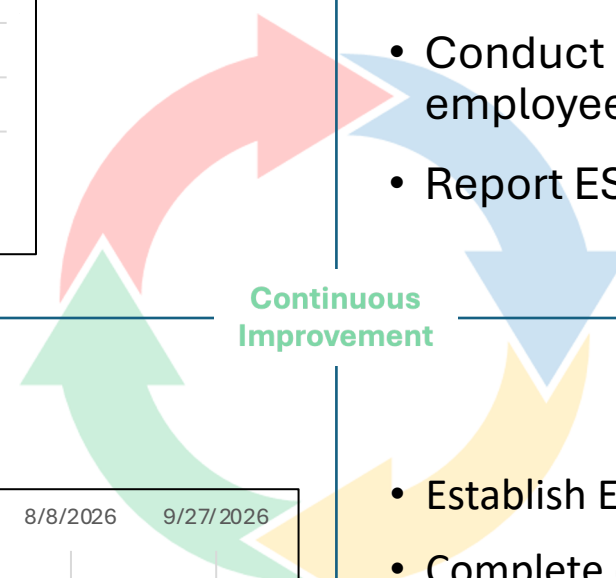
ACT

PLAN



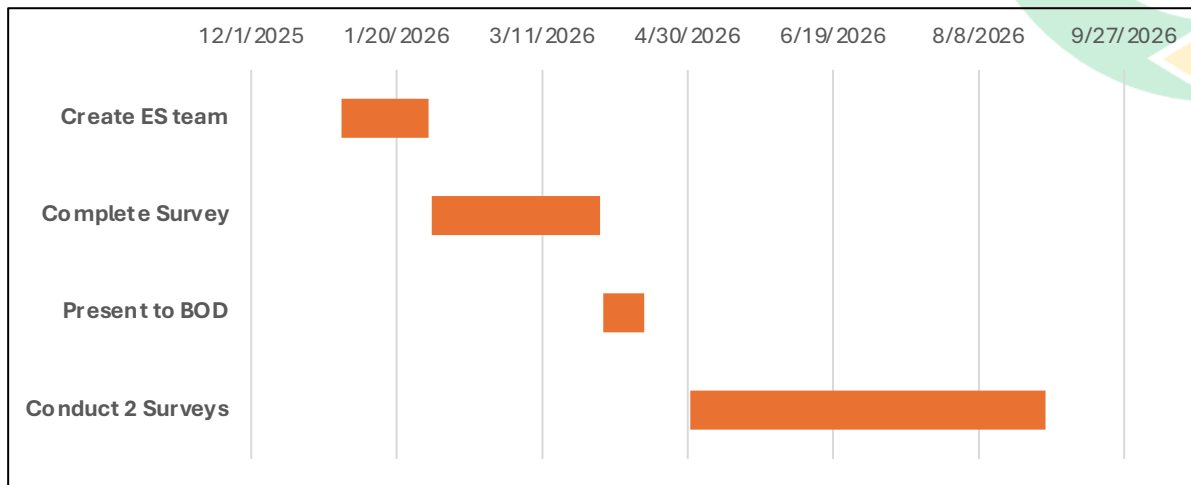
- Establish Employee Satisfaction (ES) team
- Complete confidential ES Survey and present to BOD for approval
- Conduct ES Survey for 50% of full time POA employees 3 months apart
- Report ES results at BOD meeting

Continuous Improvement



CHECK

DO

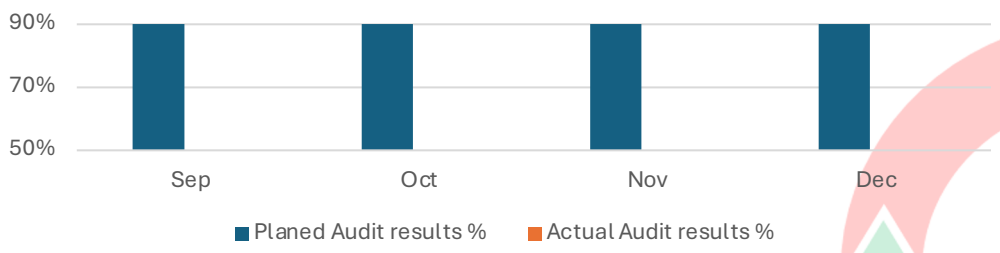


- Establish ES team headed by HR 1/31/26
- Complete confidential ES Survey 3/31/26
- Present and request BOD approval 4/15/26
- Survey 50% unique full time POA employees 5/1/26
8/1/26

ACT Countermeasure(s):
 Required if YTD results fall below plan
 Expected Results:
 Insert planned recovery graph(s)

PLAN

CUSTOMER FOCUS RESULTS

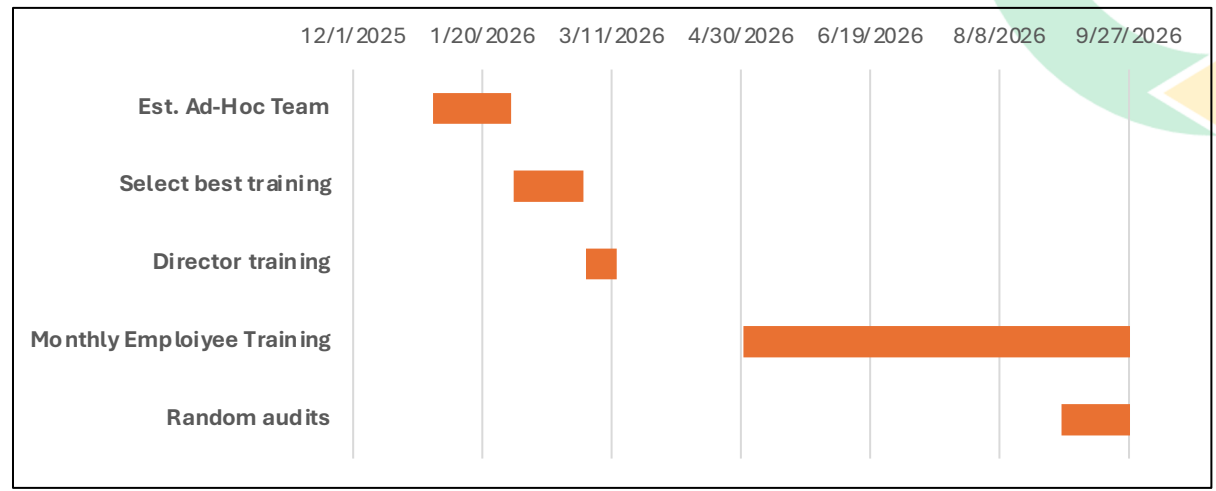


- Establish Ad-Hoc customer focused training team
- Research best customer focused on-line training programs
- Select best customer focused training programs
- POA Directors complete customer focused training and meets with Ad-Hoc customer focused training team to select best employee training programs and communicates with employees
- Recommend customer focused training programs
- Perform customer focused training for 15% of employees monthly until all employees have completed training
- Conduct random monthly audits for effectiveness of the customer focused training with goal of 90% effective

Continuous Improvement

CHECK

DO

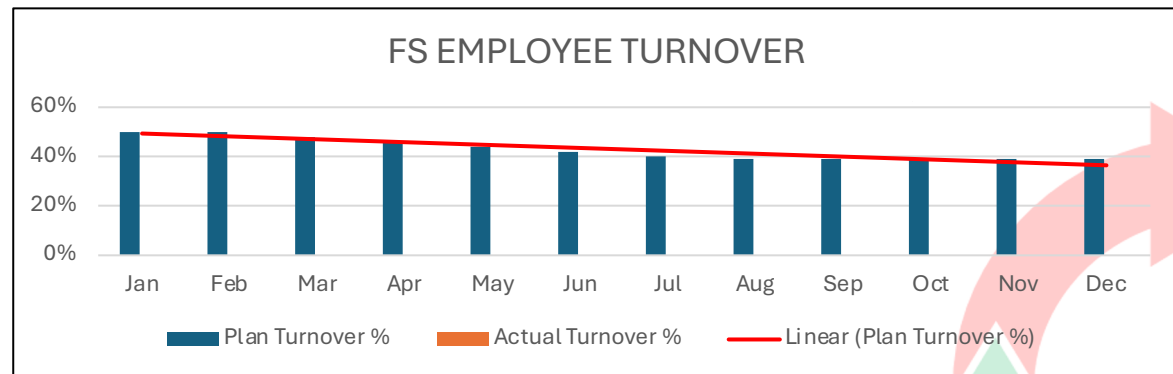


- Establish Ad-Hoc customer focused training team 1/31/26
- Select best customer focused training programs 2/28/26
- POA Directors complete customer focused training 3/31/26 and select best employee training programs with Ad-Hoc training team and communicates
- Recommend customer focused training monthly for 15% of employees 5/1/26
- Conduct random monthly customer focused audits with goal of 90% effective 9/1/26

ACT

Countermeasure(s):
Required if YTD results fall
below plan

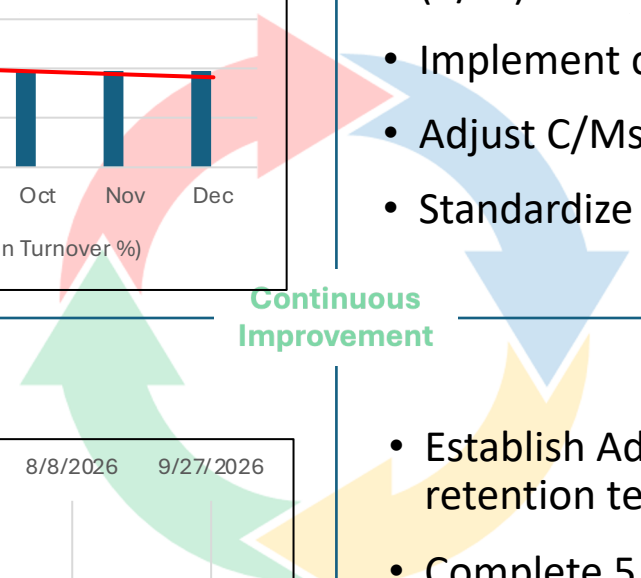
Expected Results:
Insert planned recovery graph(s)



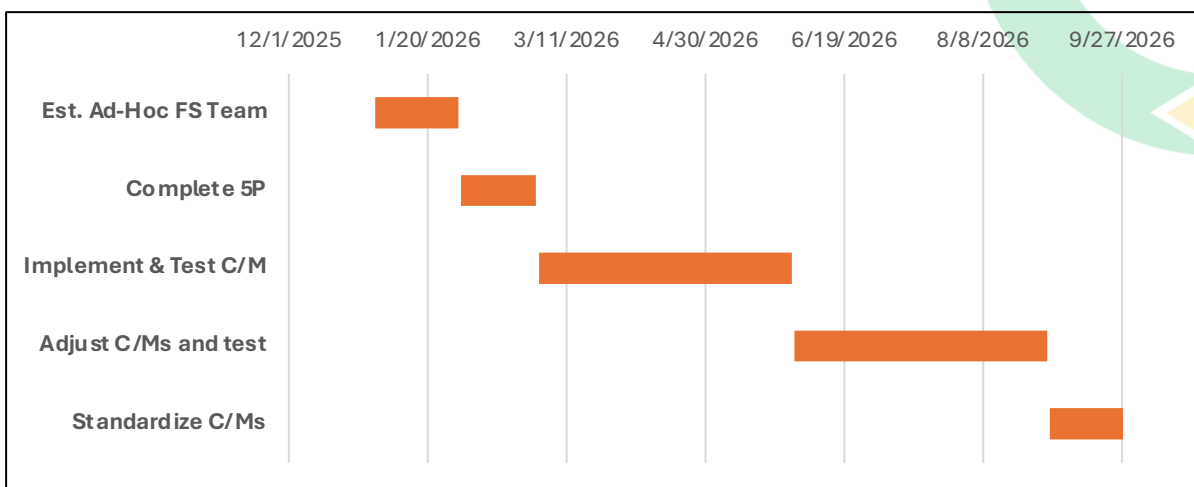
PLAN

- Establish Ad-Hoc Food Service (FS) employee retention team (4-6 people) plus facilitator
- Complete 5 Principles of Problem Solving (5P) for high FS turnover to determine ROOT CAUSE & COUNTERMEASURES (C/M) to lower combined FTE turnover to under 40%
- Implement corrective action C/Ms and test for 3 months
- Adjust C/Ms as necessary and test for another 3 months
- Standardize C/Ms to maintain lower FS turnover

Continuous Improvement



CHECK



DO

- Establish Ad-Hoc Food Service (FS) employee retention team 1/31/26
- Complete 5 Principles of Problem Solving (5P) for high FS turnover 2/28/26
- Implement corrective action C/Ms and test for 3 months 3/1/26
- Adjust C/Ms as necessary and test for another 3 months 6/1/26
- Standardize C/Ms to maintain lower FS turnover 9/1/26

Use 5 Principles of Problem Solving to determine ROOT CAUSE and COUNTERMEASURE for high FS turnover.

<p>PROBLEM STATEMENT</p>	<h2>5 PRINCIPLES FOR PROBLEM SOLVING WORKSHEET</h2>	<p>PREPARING SECTION</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">SECTION OR SUPPLIER NAME</td> </tr> <tr> <td>DATE</td> <td>APPROVED BY</td> <td>CHECKED BY</td> <td>PREPARED BY</td> </tr> </table>	SECTION OR SUPPLIER NAME				DATE	APPROVED BY	CHECKED BY	PREPARED BY	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>REPORT TO BE MADE TO</td> <td>SECTION</td> </tr> <tr> <td>APPROVED BY</td> <td>CHECKED BY</td> </tr> </table>	REPORT TO BE MADE TO	SECTION	APPROVED BY	CHECKED BY			
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REPORT TO BE MADE TO	SECTION																	
APPROVED BY	CHECKED BY																	
<p>1-A PROBLEM DEFINITION <small>Symptom content of complaint frequency -- Who, What, When, Where Why, How, How Many</small></p>	<p>1-B PROBLEM DEFINITION (GRASPING THE FACT) <small>Part check results, factor analysis, quality condition of current part / process.</small></p>	<p>Space is provided for brainstorming (1-C) and constructing a fishbone chart (1-D) on back of the worksheet.</p>																
<p>2-A IDENTIFY ROOT CAUSE (QUESTION AND ANSWER ANALYSIS) <small>From Fishbone chart</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">PROBLEM ①</th> <th style="width: 20%;">WHY ②</th> <th style="width: 20%;">WHY ③</th> <th style="width: 20%;">WHY ④</th> <th style="width: 25%;">WHY ⑤</th> </tr> </thead> <tbody> <tr> <td></td> <td>Occurrence (HARD ITEM)</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>Non-Detection (SOFT ITEM)</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	PROBLEM ①	WHY ②	WHY ③	WHY ④	WHY ⑤		Occurrence (HARD ITEM)					Non-Detection (SOFT ITEM)				<p>2-B IDENTIFY ROOT CAUS <small>Question and answer analysis, problem</small></p> <p>Root Cause Statement / Illustration</p>		
PROBLEM ①	WHY ②	WHY ③	WHY ④	WHY ⑤														
	Occurrence (HARD ITEM)																	
	Non-Detection (SOFT ITEM)																	
<p>3 CORRECTIVE COUNTERMEASURES(S) <small>Content of c/m, prediction of effects, potential problem analysis</small></p>	<p>4 CONFIRM COUNTERMEASURES(S) <small>Actual effects</small></p>	<p>5 FEEDBACK/FEEDFORWARD</p>																
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Follow-up Date</td> <td></td> </tr> </table>		Follow-up Date														
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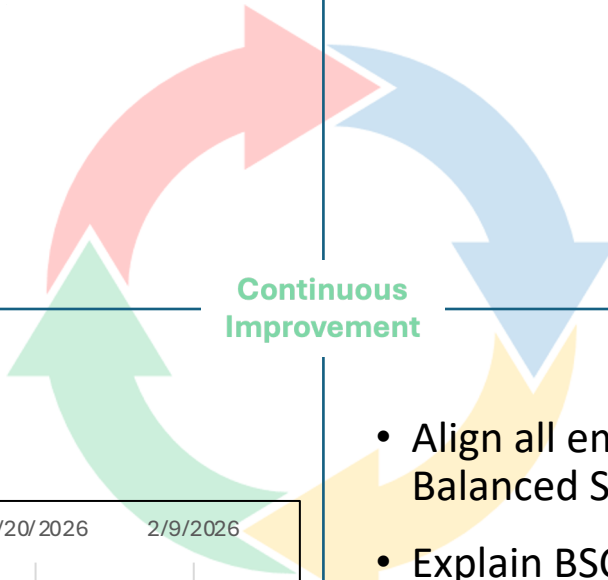
ACT

Countermeasure(s):
Required if YTD results fall below plan

Expected Results:
Insert planned recovery graph(s)

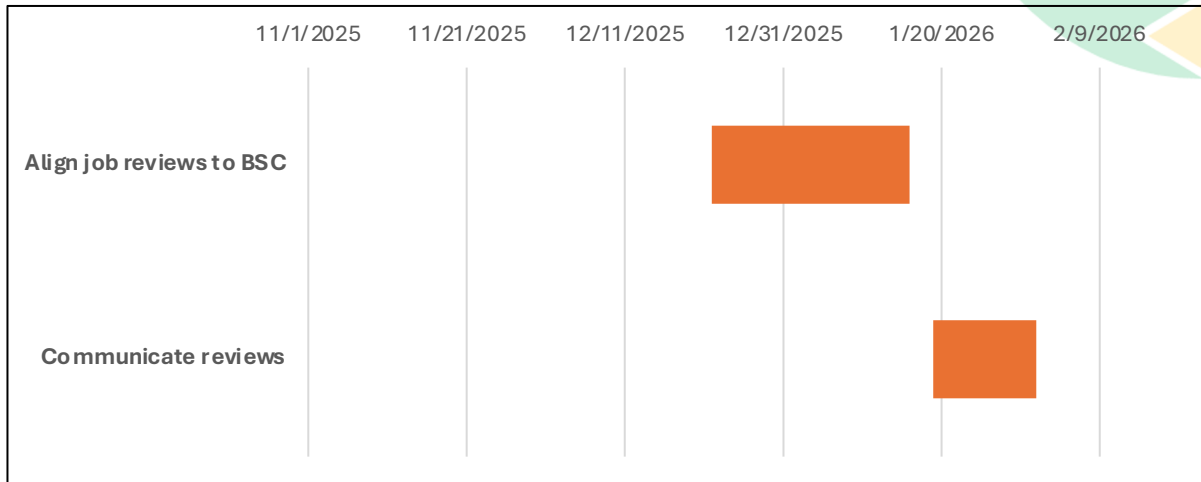
PLAN

- Align all employee annual merit reviews to Balanced Scorecard (BSC)
- Explain BSC to employees and the linkage to employee evaluations



Continuous Improvement

CHECK



DO

- Align all employee annual merit reviews to Balanced Scorecard (BSC)
- Explain BSC to employees and the linkage to employee evaluations

1/16/26

2/1/26

Questions?

