

# Preserving Valhalla Tahoe

2023-2028

The Heller Estate Strategic Plan



Valhalla Tahoe a 501(c)(3) Operating under permit with the United States Forest Service







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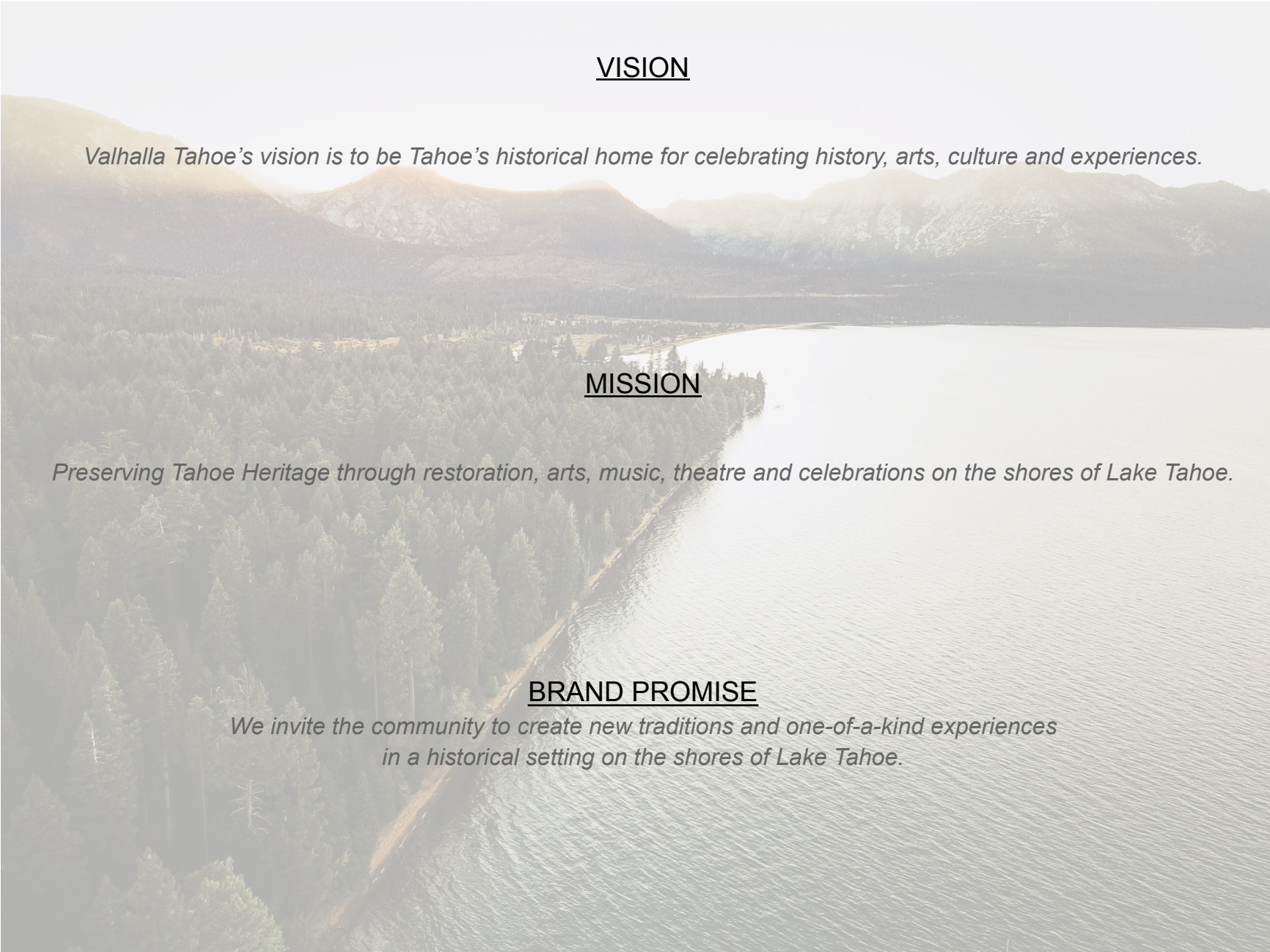
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## VISION

*Valhalla Tahoe's vision is to be Tahoe's historical home for celebrating history, arts, culture and experiences.*

## MISSION

*Preserving Tahoe Heritage through restoration, arts, music, theatre and celebrations on the shores of Lake Tahoe.*

## BRAND PROMISE

*We invite the community to create new traditions and one-of-a-kind experiences  
in a historical setting on the shores of Lake Tahoe.*



# Providing for the Future

Valhalla has survived many storms over the past century. As the Grand Hall of Walter and Claire Heller's Tahoe estate approaches 100 years old, Valhalla Tahoe's mission of preservation becomes ever more important.

A hundred years of use for events, harsh Tahoe winters and destructive wildlife combine to create an endless list of repairs, maintenance and restoration projects around the estate. Fortunately Valhalla's Tahoe's dedicated Board of Directors continues to re-evaluate and re-align to meet the changing conditions surrounding tourism in Lake Tahoe. With cultural celebrations like weddings being the main revenue generator for the organization, Valhalla Tahoe's task is to hold enough weddings to generate enough revenue to complete the repairs needed at the estate each year.



Valhalla Tahoe not only provides for the future of the Heller Estate, it also provides for the future of the community. Art, music and theatre have proven to be key components of mental health and there is not a more beautiful place to experience a concert or a play than Valhalla's Grand Lawn or Boathouse Theatre. Valhalla Tahoe provides a venue for low-cost and no cost art, music and theatre events, as well as being a serene location to take walks and enjoy the interpretive aspects of the Tallac Historic Site. Being on United States Forest Service property, public access remains one of the key priorities of Valhalla Tahoe. Valhalla Tahoe's Board of Directors has years of combined experience and the drive to ensure Valhalla Tahoe has a solid foundation for operation in the digital age.



# Introduction

## *How to Use This Preservation Plan*

### 1. How plan was developed

#### a. Board Retreat

Valhalla Tahoe's Board of Directors met at the South Lake Tahoe Realtor's Office on August 23, 2022. The session was moderated by South Lake Tahoe City Manager Joe Irvin. The goal was to review the [outcomes](#) of the previous [5-year Strategic Plan](#) created with the help of Nancy Kerry in 2019, identify how the organization's goals have evolved in the past 4 years and lay the foundation for continued growth.

#### i. Goals that were met in the three years since the plan was created include:

1. Revenue exceeding expenses by 30%
2. Increase net cash position by \$75K
3. Adopt a fee policy and rate structure to review annually
4. Putting \$300K in a reserve fund
5. Create a 5-year capital expenditures and maintenance plan
6. Adopt annual marketing plan
7. Hold 40th Anniversary event
8. Diversify and expand events
9. Promote historic wedding location
10. Align staffing with priorities

#### ii. Items that still need to be addressed include:

1. Expand collaborative partnerships
2. Expand corporate use opportunities
3. Update Board of Directors bylaws and policies
4. Adopt Board of Directors protocols



5. Rebranding and audience based programming
6. Expand volunteer corps

## 2. Changes and Progress in the Organization

### a. How organization came to be

The Heller Estate or “Valhalla” was originally part of Elias “Lucky” Baldwin’s property that included the Tallac Resort at Tallac Point just west of the Baldwin Estate. Walter and Claire Heller built the estate in 1922 after purchasing the land from George Pope. The United States Forest Service purchased the property in 1971 and used it as dormitories for summer USFS workers. The estates fell into a state of disrepair and were closed for a period of years until they were opened up and restored with the support of Valhalla Tahoe (founded 1979). Today, the Valhalla Boathouse Theatre is a unique cultural resource in the Tahoe basin, indeed in all of northern California and northern Nevada. No other arts venue showcases Tahoe heritage and the stunning beauty of the lake like the Boathouse Theatre. Every summer, Valhalla Tahoe hosts cultural events including having an artist in residence, concerts in the Boathouse Theatre, free lawn concerts, plays, the Word Wave 1-Act Play competition and the Holiday Faire. Valhalla also rents the property to non-profits for events and cultural celebrations. Valhalla Tahoe is a volunteer based non-profit 501(c)(3) organization that was recognized by the State of California in June of 1984. Valhalla Tahoe has a very small, dedicated staff and a wonderful, 12-person Board of Directors. The Board meets virtually every fourth Wednesday of the month at 5:30 to discuss Valhalla Tahoe’s Business Agenda. The Executive Committee is made up of the President, Vice-President, Treasurer, and Secretary.

### i. Tallac Site Master Plan

The Lake Tahoe Basin Forest Management Unit (LTBMU) Forest Plan (1988) established the Tallac Historic Site as a Special Interest Area. The Tallac Historic Site is located within the Fallen Leaf Management Area of the Forest Plan. The resource management emphasis for this area (page IV-87) states:

‘Management emphasis will be upon enhancing recreational opportunities and cultural resource values. New sites will be constructed and existing ones will be maintained.



The Forest Plan direction (page IV-88) further states:

‘Implement the plan for the Tallac Historic Site approved in 1980, to provide for public use and enjoyment, while preserving the historically significant aspects of the estates. Where it doesn’t conflict with public access the structures and grounds will be made available for a variety of adaptive uses to help generate restoration and maintenance funds. Valhalla’s main house will be used as a community resource, managed by the Tahoe Tallac Association [now Valhalla Tahoe], to accommodate non-profit cultural and educational events, ceremonies, performances, meetings or exhibits appropriate to its scale and harmonious with the ambient atmosphere desired for the complex.

The general vision of the Estates site, discussed in the 1980 EA, was to provide a public recreation space on the shore of Lake Tahoe. This space would provide an atmosphere of tranquility, resonate with the history of the site, and offer site related visitor services. It would also be used as an educational and interpretive complex, a community resource for cultural and civic events. The bike trail, which emphasizes non-motorized access, maintains a feeling of timelessness which sets the area apart from much of the South Shore. The site provides LTBMU with office and conference space and provides housing for Forest Service employees. Management strategies and solutions for implementation of the vision were to remain flexible in terms of patterns of use, monetary commitments, and management. The restoration and rehabilitation of the site and the conversion of the boathouse into a small community theatre is consistent with the interpretive goals which are to retain the ambiance of the site and its structures for interpretive purposes.

## 1. Valhalla Tahoe Permit and Operating Plan

Valhalla Tahoe’s Operating Permit with the United States Forest Service expires after 40 years on July 1, 2026. Valhalla Tahoe intends to seek a new permit for 2027 and beyond. Every 5 years Valhalla Tahoe submits an Operating Plan for approval by the USFS. The 2022 Operating Plan guides how Valhalla Tahoe can do business and outlines policies for preserving the historic nature of the buildings and estate. Every year the USFS approves Valhalla Tahoe’s schedule of events, Department of Alcohol Beverage Control permits and Grainer Thye Offset projects.

### ii. Goals then and now

After ending up with a negative cash position In 2018, Valhalla Tahoe’s focus was on rebuilding the financial capacity to continue operation. This was challenged in 2020 when the global pandemic



required the venue to go dark for a year. As events began to take place again, Valhalla Tahoe was able to capitalize on the large number of couples ready to hold weddings in 2021 and 2022. Holding a record number of events each of these two years allowed Valhalla Tahoe to net 121K and 179K, which combined to meet the Board of Directors' goal of putting \$300K into Valhalla Tahoe's reserve fund.

## 1. Preservation

- a. The Heller estate will celebrate its 100th anniversary of the Grand Hall in 2024. Since the organization's inception, one of its goals has been to restore the site. Through Grainger Thye offset fees, many projects have been completed around the estate with the approval of the USFS. See the timeline of major repairs below for an overview of when important projects were done.
- b. Revenue in 2021 and 2022 combined to be \$1,448,918 generating \$217,337 for Grainger Thye Offset preservation projects. Projects completed include matching \$50K with the Forest Service to expand the parking lot from 32-73 spaces, \$60K to reshingle both of the twin cabins and \$60K in shingles to re-roof the Boathouse in the spring of 2023.
- c. Valhalla Tahoe also independently raised money to fund \$42K in new theatre lights for the Boathouse, In 2022 Valhalla Tahoe also converted the street lights to LED and installed heat tape on the north side of the grand hall roof to alleviate the ice damming issue causing dripping inside the Grand Hall.

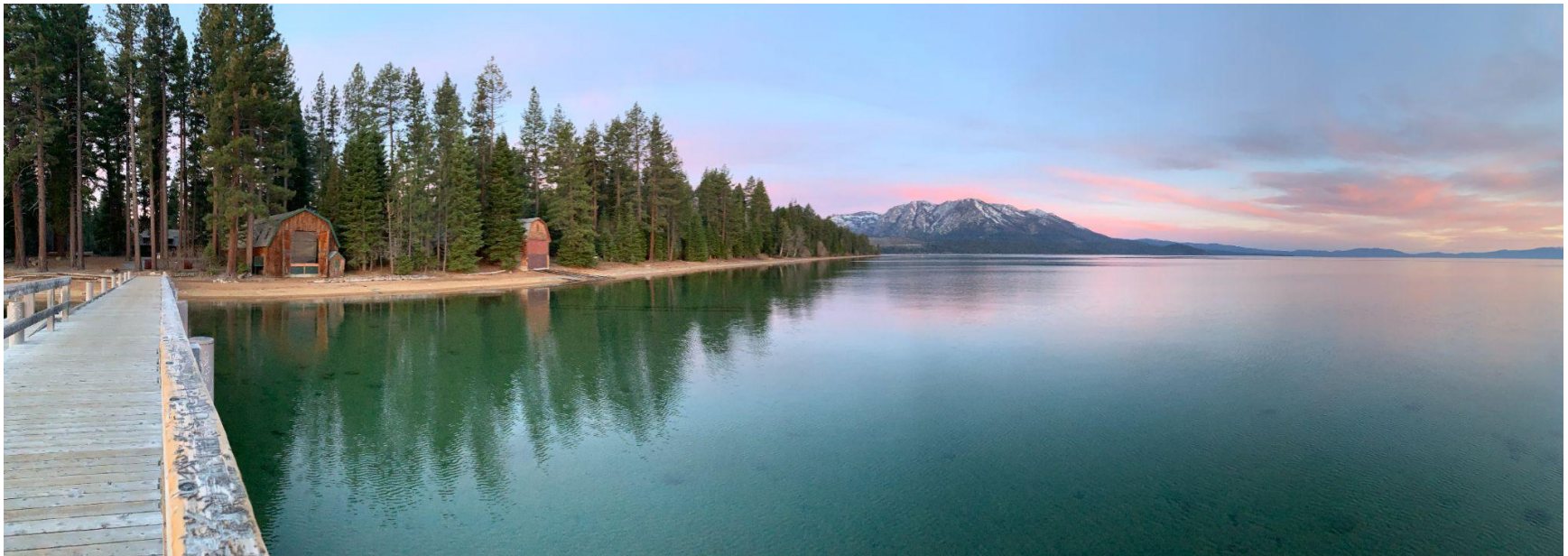
## 2. Art, Music and Theatre

- a. Valhalla Tahoe's goal has always been to be the premier performing arts center for South Lake Tahoe. Through the annual performing arts programming, Valhalla Tahoe brings diverse events to community members and visitors at low or no cost in a historic setting. Valhalla Tahoe's summer program has varied in size and popularity.
- b. For the past 8 years combined ticket sales have averaged 2,430 with a high of 3,631 in 2018.

- c. In 2022 Valhalla Tahoe held 10 Boathouse concerts, 3 free lawn concerts, 3 improv shows, 1 magic show, 1 historic presentation, the summer play Silent Sky, the fall play, Motherhood Out Loud, 1-act play competition Word Wave, and the original Tahoe musical Guilty Christmas.
- d. Valhalla Tahoe also hosted 3 free open mic nights in the Boathouse Theatre and opened an art gallery in the Twin Cabins.

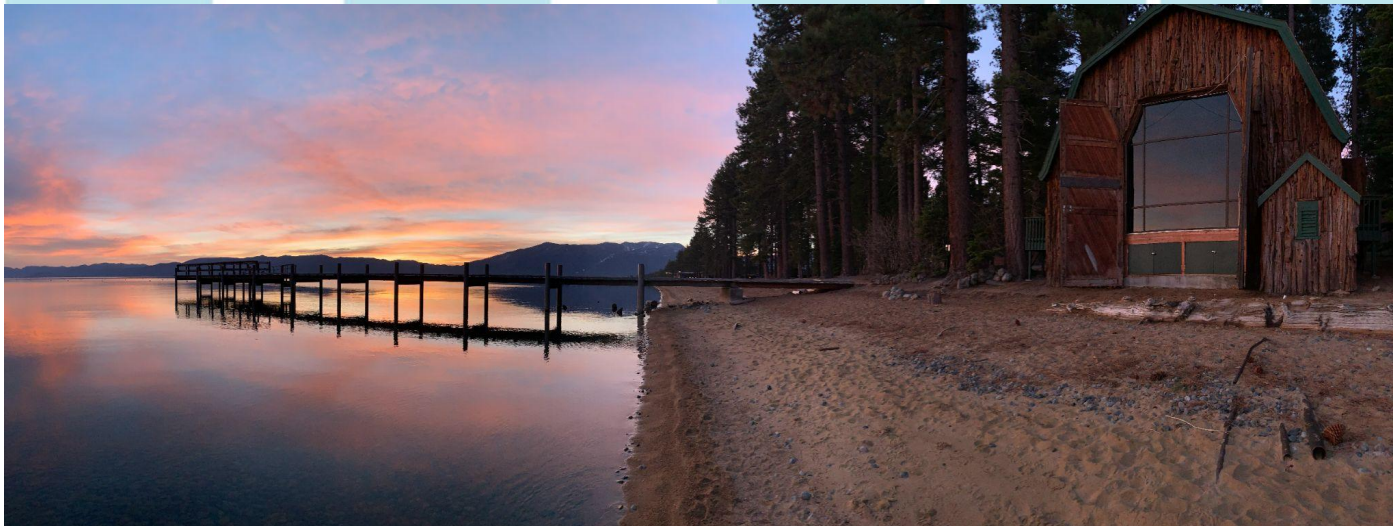
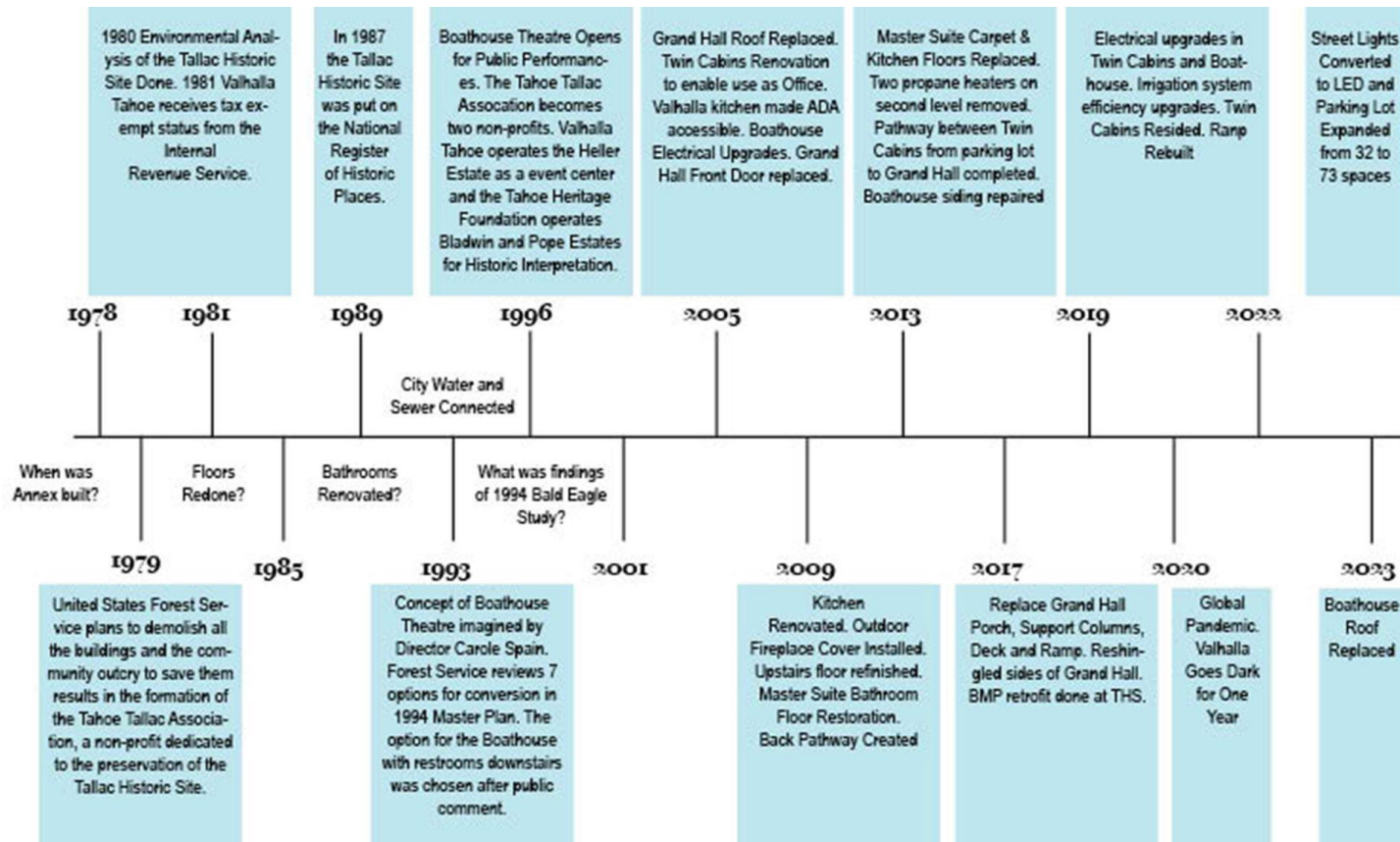
### 3. Community Events

As a community center, Valhalla Tahoe rents the Grand Hall for non-profit fundraisers, hosts community organization trainings, as well as reunions and holiday parties. We hold a children's art camp for two weeks, host piano recitals, a free Young Shakespeare performance on the lawn and the free holiday faire. Valhalla Tahoe also hosts cultural events like weddings, vow renewals and celebrations of life. These premium events are the main funding for staffing and restoration at the site.





## Valhalla Tahoe Preservation Timeline





# Goals, Objectives, and Tactics

## Goal #1

To provide and ensure a sustainable operational structure of the organization.

**Objective:** To ensure the operation of the organization in accordance with best practices for nonprofits.

**Tactics:**

- **Governance Committee** to create a stable foundation for operation of the Board of Directors by updating Valhalla Tahoe's Bylaws and ensuring compliance with them and non-profit regulations. Ensure all board members are setup for success in their roles by outlining the responsibilities of each of the executive committee positions and an onboarding process for new board members.
- Create a Valhalla Tahoe Policies Manual. This manual will provide essential information on the structure, policies, and operation of the organization. This will be a living document updated by the secretary after any board meeting





where policies are put in place and will include a sample agenda and Board of Directors meeting execution guidelines. Ensure the Executive Director has the opportunity and support needed to continue education in these areas.

- **Governance Committee** to review and ensure compliance with 1994 EIS Master Plan, 2005 USFS Permit and 2022-2027 Operating Plan. Together with the Executive Director they will evaluate and update procedures in areas we are not in compliance. The committee will cultivate a relationship with Valhalla Tahoe's USFS Permit Administrator and LTBMU Forest Service Supervisor in order to prepare for the permit renewal process starting in 2024 and ensure our goals are aligned to meet the Forest Service selection process. Assess the likelihood of negotiating GT percentage down or basing it on Net Revenue instead of Gross Revenue.
- Create a **Risk Management Committee** to evaluate insurance coverage, workman's compensation and trainings and policies for compliance with state and federal laws, as well as Cal OSHA best practices. Ensure the Executive Director has the opportunity and support needed to continue education in these areas. Ensure volunteer waivers



meet standards needed to protect the organization against lawsuits while growing the volunteer corps with more social events, incentives for volunteering for art gallery and tours, incentives for select volunteers to get certified to be bartenders.

- Form **Finance Committee** to evaluate and maintain tax exempt status. Review contracts to ensure tax exempt status is retained, donations portion of rental goes to Preservation Fund and will stand up in court. The committee will ensure alignment between revenue streams, expenses and facility maintenance and restoration plans. Formalize staffing and employee growth plans to provide competitive wages, benefits and incentive to stay with the organization.

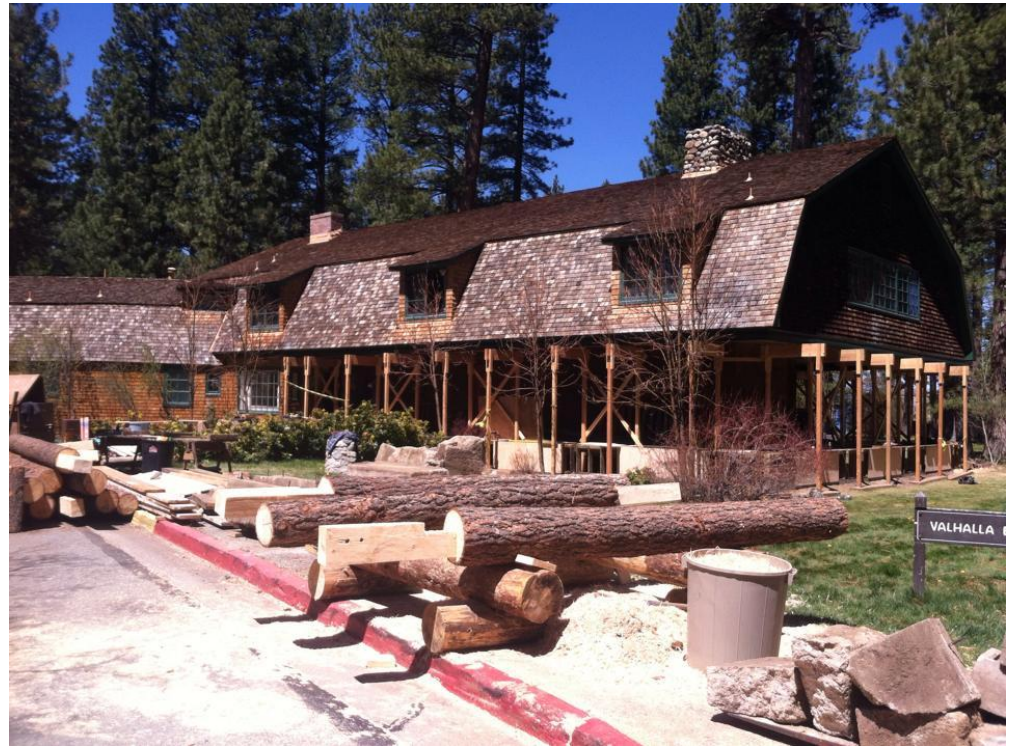
## Goal #2

Create a 5/10/20-year facilities plan to support our mission of preserving the Heller Estate

**Objective:** To effectively maintain the integrity and character of the structures

**Tactics:**

- Form a **Preservation Committee** to review and prioritize the current maintenance project and capital project list. Committee will anticipate major projects that will be needed over the next 5 years.
- Create a Preservation Plan Fund for a Historic Structures Evaluation and identify funding sources including a percentage of wedding rental revenue dedicated to this fund, a specific donation campaign and grants. The evaluation will be the basis for a 20 year Preservation Plan. Work with the Forest Service to determine how the evaluation will be done.
- Committee will then create a 20-year master Grainger-Thye offset project plan and review with the Forest Service Supervisor to ensure priorities are aligned. Valhalla Tahoe budgets and financial goals for each year will then be determined based on total GT required to cover that year's Grainger-Thye offset expenses.





## Goal #3

Developing a programming and revenue structure that supports the mission.

**Objective:** Diversify revenue streams and create stability in arts programs.

**Tactics:**

- Form an **Events Committee** to create Standard Operating Procedures for choosing Annual Event Schedule. Identify number of calendar dates reserved for each type of event (ie. art, music & theatre). Determine how many free or low-cost events can be supported.
- Solicit audience feedback on the types of events and mix of music that would be popular enough to sell out the 164-seat theatre.
- Budget for and partner with an advertising firm to conduct patron surveys, revamp Valhalla Tahoe's brand, identify key audiences and markets for growth, and create professional marketing pieces that supplement social media and marketing efforts on site.
  - Create a **Fundraising Committee** to identify grant opportunities that will provide \$25K+ funding for art, music and theatre programs and preservation of the buildings and site. The fundraising committee will also focus on making connections with donors to support operations and theatre programming.



# Who We Are

## Valhalla STAFF



Michelle Morton  
Executive  
Director



Ryan Reese  
Assistant Site  
Manager



Moxie Fox  
Gate &  
Stage



Anne  
Lopez  
Site Host



Stacy Lopez  
Site  
Host



Barbara  
Riley  
Site Host



Layla  
Hammond  
Bartender/Host



David  
Schumacher  
Bartender/Gate



Linda  
Wunder  
Gate Attendant



Lopaka  
Matthews  
Gate Attendant



Michael  
Farnon  
Gate Attendant

## Board of DIRECTORS



David Kurtzman  
President



Frank Riley  
Vice President



Jerry Bindel  
Treasurer



Tawni  
Janvrin  
Secretary



Bob  
Sweatt  
Project Manager



Stephanie  
Grigsby



Ginger  
Nicolay-Davis



Sharon  
Kerrigan



Norm  
Glenn



Lindsey  
Baker



Melissa  
Balough



Nicole  
Thomas

## Members

Members support Valhalla Tahoe's efforts to bring quality art, music and theatre events to South Lake Tahoe. In return they get access to early bird tickets, the Backstage at the Boathouse newsletter, discounted tickets, a free drink at every show, members only drawings and the annual members-only event.

Renewed efforts to drive membership in 2021 and 2022 after the pandemic resulted in 160 paid memberships. It generated more than double the average membership revenue over the past 10 years and it was an 81 percent increase in membership revenue between years.



## Volunteers

Valhalla Tahoe could not execute more than 100 events per year without the help of people who volunteer their time. Every year volunteers and the California Conservation Corps spend 2-4 days raking pine needles and doing spring cleaning on the property. Most music and theatre events require 5 or more volunteers. 10+ volunteers were needed each day for the Holiday Faire.

In 2022, Valhalla Tahoe had 65 active volunteers who filled 279 volunteer shifts. This represents a total of 1140 Volunteer Hours donated to Valhalla. There were 380



volunteer shifts available, so 30 percent of shifts went unfilled. Many of these shifts were art gallery host shifts that were new for 2022.

Valhalla Tahoe will incentivize volunteers to act as art gallery hosts who also do public group tours of the Grand Hall in 2023. Recognizing and rewarding volunteers for their dedication is a key part of building a strong volunteer corps for future years.

