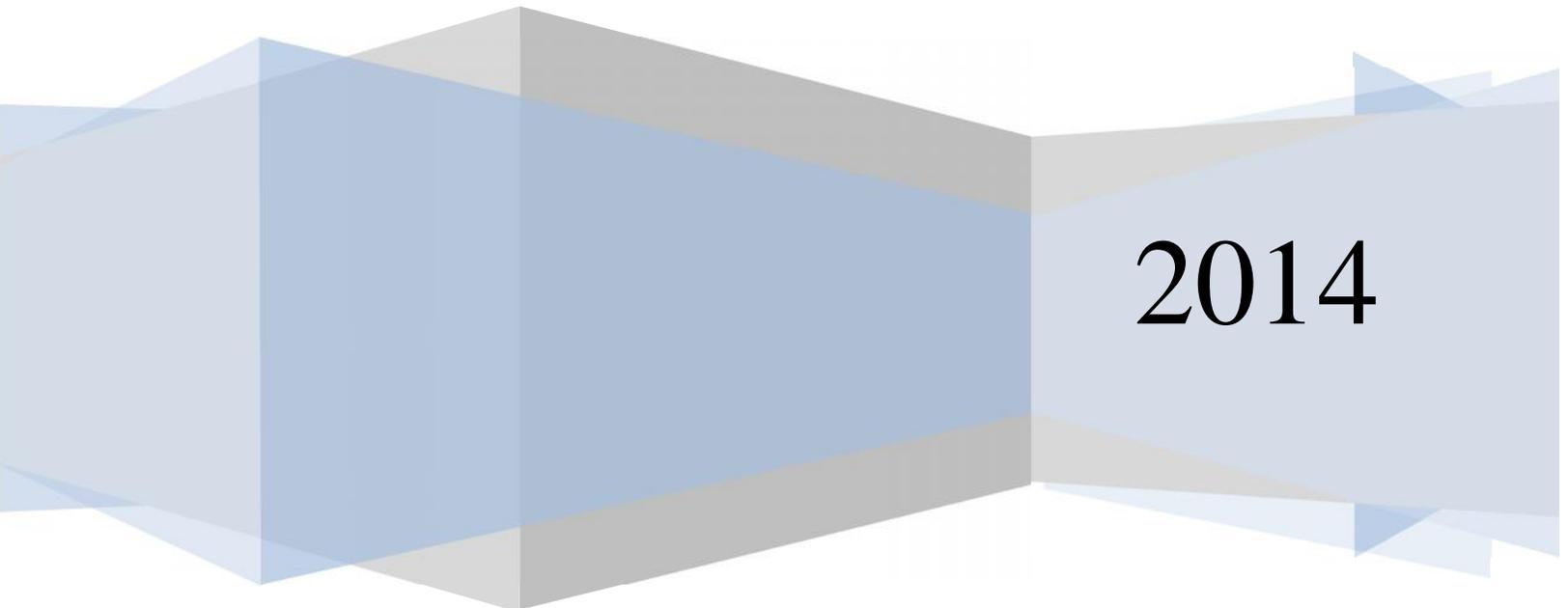


# Plaza Midwood Merchants

## Board Retreat

Hosted by the City of Charlotte at the UNC Charlotte Uptown Campus



2014

## Plaza Midwood Merchants

### 2014 Board Retreat

#### Background

On Saturday, July 20, 2013, the board members of the Clanton Park Neighborhood Association participated in a board retreat facilitated by the City of Charlotte, hosted at Foundation For The Carolinas. The following board members participated in the retreat:

- Bob Smithwick
- Matt Ferguson
- Alicia Roskind
- Carlo Martini



The City of Charlotte values citizen leadership and its ability to make an impact in the communities in which we all live, work, play and shop. With this in mind, the board retreat process was initiated to help neighborhood based organizations develop strategic plans to improve quality of life in their communities.

#### Purpose

The purpose of the board retreat was to

- Generate meaningful conversations around improving quality of life in our community
- Set clear goals and priorities for the upcoming year(s)
- Develop a vision and strategic priorities for our community

By participating in the retreat, our board earned a \$3,000 Neighborhood Matching Grant credit to help execute one of the projects we identified.

#### Process

Our board retreat was conducted by an external facilitator, tasked to keep our conversations on-task, productive, and focused on achievable objectives. The process was designed to help us capture what was the best of the past, what is the best of the present, and how we can add to our strengths to build a better future. The focus was:

- Developing a vision to guide our decision making and activities
- Developing strategic priorities that aligned with our vision
- Developing project ideas

The agenda for the day was as follows:

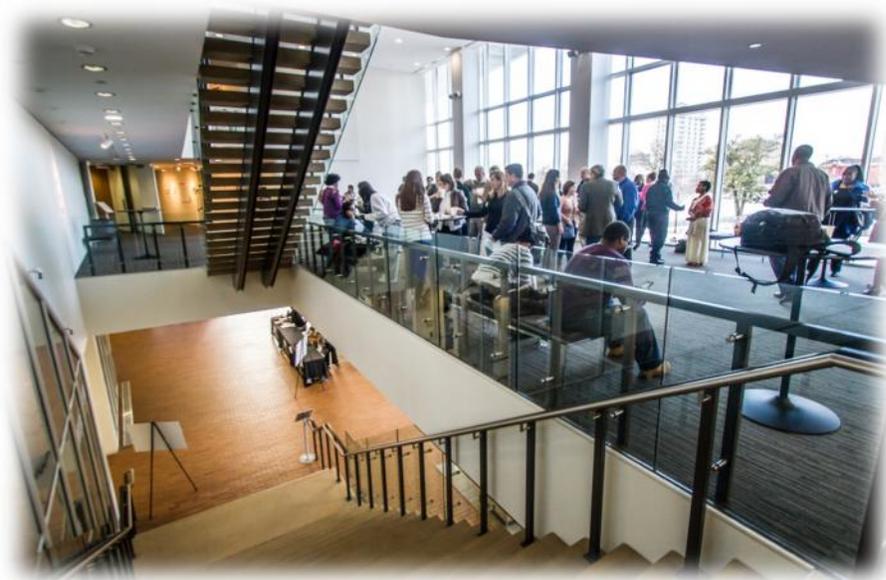
- Introductions
- Where Have We Been? Where Are We Going?: Arrow Activity
- Where We Want to Be: Vision Statement Exercise
- Seeing the Forest through the Trees: Developing Strategic Priorities
- Working Lunch – The Year Ahead
- Where’s the Energy – Energygram Exercise
- Project Planning Worksheet Review

### **Where Are We Going, Where Have We Been?**

We began our day with paired interviews, using the “Where Are We Going, Where Have We Been?” activity. The activity was intended to help us reflect on:

- What we value
- What are the best things about our community and the people who live here
- What are our past successes
- Where are the potentials and possibilities

After interviewing our partners we shared our discussion with the group, finding commonalities in our conversations.



<b>Where We Were:</b> Reflecting on our past, what were some of the best/worst moments?	<b>Where We Are:</b> Why/why not would a person/business want to move into our community?	<b>Where We Want to Be:</b> If you could make 3 wishes to make our community flourish, what would they be?
<p style="text-align: center;"><b>Positive</b></p> <ul style="list-style-type: none"> <li>- Pedscape</li> <li>- Crime is down</li> <li>- Social/Cultural Destination</li> <li>- Entrepreneurial spirit</li> <li>- Groups/Events</li> <li>- New Businesses opening</li> </ul> <p>Worst</p> <ul style="list-style-type: none"> <li>- Split affected neighborhood (pedscape)</li> <li>- Penguin Diamond Animosity</li> <li>- Idle property owners Parking</li> </ul>	<p style="text-align: center;"><b>Why</b></p> <ul style="list-style-type: none"> <li>- Unique</li> <li>- Social</li> <li>- Patronized by local residents</li> </ul> <p style="text-align: center;"><b>Why Not</b></p> <ul style="list-style-type: none"> <li>- Aesthetics</li> <li>- Parking</li> <li>- No real cohesive Biz groups</li> </ul>	<ul style="list-style-type: none"> <li>- Preservation</li> <li>- Walk ability</li> <li>- Atmosphere</li> <li>- Beautification</li> <li>- More Retail</li> <li>- Innovator/Progressive</li> <li>- Culture/Art</li> <li>- Influence on City</li> </ul>

Based on this activity, our group identified shared values that would help us craft the vision for our community:

- Beautification
- Culture/DNA
- Preservation
- Cohesion
- Anti-Isolation
- Diversity
- Eclectic
- Tolerant
- Fun



## Our Vision

Our vision is the unifying statement for our community that will guide our decision making and reminds us of what we are trying to reach. It is based on our shared values and preferences for our community's future. It combines the best of what was, what is, and what could be.

### OUR VISION:

Plaza Midwood Merchants; we are historic, eclectic, social, community oriented, artistic, cultural, fun, and unique.

## Strategic Priorities

After committing to a shared vision, the board began to brainstorm on strategic priorities. This is where we began to define what is most important to us in order to achieve our vision. Strategic priorities are initiatives that will help us move closer to our vision of our community. The idea is to focus on a few things and do them very well as opposed to many things and missing the mark.

We started out thinking big and then narrowed down our focus. We utilized the Affinity Mapping Process, detailed below:

- Grab some sticky notes from the table. Keeping the vision statement in mind, write down as many of the following as you can think of, one per sticky note:
  - Current action items getting you closer to our vision.
  - Current realities keeping you from our vision.
  - Possible priorities/actions items to get us closer to our vision.
- Place the sticky notes on the chart paper.
- Organize the ideas by natural categories. Which ideas go together? Feel free to move any post-it note to another place. Move yours, move those of others, and feel free to do this. Do not be offended if someone moves yours to place where you feel it does not belong, just move it where you believe it goes.
- Once everyone agrees on the groups, give each one a name.

This activity led us to the following categories:

**Organizational Development**

- Board Recruitment/Volunteer Drives
- Definition of Scope/Structure/Form committees
- Establish value to board members
- Institutional knowledge

**Communications**

- Monthly business profile highlights/Town Hall meetings
- Create excitement around our vision/Proof of impact
- More uptown PM events
- Communicate (clearly) to neighborhood

**Partnerships**

- PMNA & PMM Coordination
- Form partnerships with other neighboring assoc. & businesses
- HDC Zoning exploration & partnerships with

The board then identified the three priorities that were most important for us to begin working on to achieve our vision:



**Potential Projects**

The board then began to brainstorm on possible projects or activities that aligned with their strategic priorities:

**Organizational Development**

- Define Org Structure - Hierarchy/Roles/Rules of Engagement
- Establish Rewards system for participation

**Partnerships**

- Blueprint for "Neighborhood Association's Summit"
- Establish relationships with: CMS, Rotary, VFW, Civic Orgs., LGBT community, ASC
- Family Friendly Events/Incentives

**Communications**

- Welcome Basket
- St. Engage Realtors
- Neighborhood "Swag"

Action Items for 2014-2016

After identifying potential projects, the board voted on one project to pursue for each strategic priority in 2013-2015:



## 2014 Neighborhood Board Retreat Summary

Plaza Midwood Merchants Association

### OUR VISION:

Plaza Midwood Merchants; we are historic, eclectic, social, community oriented, artistic, cultural, fun, and unique.

**TO HELP US REACH OUR VISION; WE WILL FOCUS ON THREE STRATEGIC PRIORITIES:**



**IN 2012-2014, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:**



## Resources to Get Started

Project	Getting Started	Resources
<b>Project #1 Establish Rewards Structure for participation</b>	<ul style="list-style-type: none"> <li>Identify ways to promote participating business members</li> </ul>	<ul style="list-style-type: none"> <li>Highlight participating business/members on PMM website</li> <li>Offer participating members an opportunity to be showcased on the City of Charlotte’s <a href="http://CharlotteBusinessResources.com">CharlotteBusinessResources.com</a> website. Business(es) will be highlighted via a “Business Spotlight” photo prominently displayed in the home page “slider.” In addition to tweets and Facebook posts about the business, an interview with the business will be a featured blog. Contact Natasha Warren (<a href="mailto:nwarren@charlottenc.gov">nwarren@charlottenc.gov</a>) and Christi Floyd (<a href="mailto:cfloyd@cahrlottenc.gov">cfloyd@cahrlottenc.gov</a>) for more details on how this can work for Plaza Midwood.</li> </ul>
	<ul style="list-style-type: none"> <li>Incentivize people who pay dues early or on time</li> </ul>	<ul style="list-style-type: none"> <li>Give a discount to those who pay early dues</li> <li>Mention those who have already paid their dues on website/newsletter</li> <li>Recognize people who have paid dues in a community meeting</li> </ul>
<b>Project # 2 Establish Community Relationships</b>	<ul style="list-style-type: none"> <li>Develop a list of key community and business organizations that will be meaningful stakeholders for PMM.</li> </ul>	<p style="text-align: center;">Organizations to consider:</p> <ul style="list-style-type: none"> <li><a href="#">Charlotte Center City Partners</a></li> <li><a href="#">Charlotte Chamber of Commerce East Chapter</a> <ul style="list-style-type: none"> <li><a href="#">Charlotte East Community Partners</a></li> </ul> </li> <li><a href="#">Charlotte E.A.S.T. (Eastland Area Strategy Team)</a></li> <li><a href="#">Shamrock Drive Development Association</a> <ul style="list-style-type: none"> <li><a href="#">Charlotte Business Guild (LGBT)</a> <ul style="list-style-type: none"> <li><a href="#">Arts &amp; Science Council</a></li> </ul> </li> </ul> </li> <li><a href="#">Midwood International &amp; Cultural Center</a> <ul style="list-style-type: none"> <li><a href="#">HackerSpace Charlotte</a></li> </ul> </li> </ul>
<b>Project #3 Create Welcome Baskets</b>	<ul style="list-style-type: none"> <li>Include key information on City and County Services</li> </ul>	<ul style="list-style-type: none"> <li>Consider including the following City/County information: <ul style="list-style-type: none"> <li>Graffiti Letter from Curt White</li> <li>Sign permit FAQs</li> <li>Business Corridor Grants handout (façade and security grant programs)</li> <li>Mecklenburg County Business Recycling</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>Other things to consider:</li> </ul>	<ul style="list-style-type: none"> <li>Write a short welcome letter: <a href="http://www.writeexpress.com/welcom10.html">http://www.writeexpress.com/welcom10.html</a></li> <li>Consider including demographic and other information: <a href="http://smallbusiness.chron.com/business-welcome-packet-ideas-22681.html">http://smallbusiness.chron.com/business-welcome-packet-ideas-22681.html</a></li> </ul>

