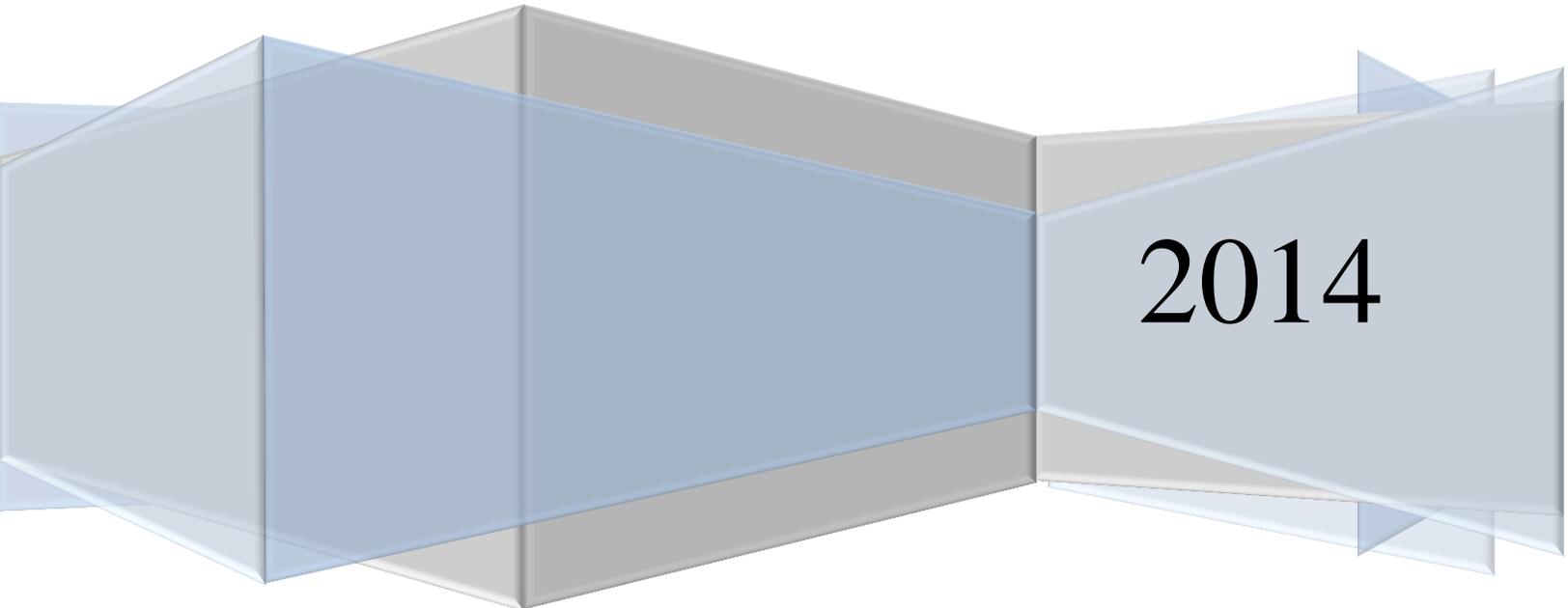


# Turtle Rock Homeowners Association

Board Retreat

Hosted by the City of Charlotte at UNC Charlotte Uptown Campus



2014

# Turtle Rock Homeowners Association

## 2014 Board Retreat

### Background

On Saturday, July 19th 2014, the board members of the Coventry Woods Neighborhood Association participated in the Neighborhood Board Retreat hosted by the City of Charlotte at UNCC Uptown Campus. The following board members participated in the retreat:

- Vernetta Mitchell
- Gwen Easley
- David Logsdon
- Miranda Hairston
- Sandy Momments



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 \$1,500 Neighborhood Matching Grant credit to help execute one of the projects we identified. The credit will be applied to our neighborhood's required match and must be accompanied by a completed Vision to Action Idea Development Book alongside a NMG application. NMG credits expire one-year from the date of retreat attendance.

### Process

Our board retreat was conducted by professional facilitators trained to keep our conversations on-task, productive, and focused on achievable objectives. The process was designed to help capture the best of the past, 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
- Idea Development – Time for participants for develop an action plan for goal achievement.

### 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>Best</p> <ul style="list-style-type: none"> <li>✓ Street lights</li> <li>✓ City Water (annexation)</li> <li>✓ More sidewalks than most communities</li> <li>✓ Improvements in traffic flow (4-way stops)</li> <li>✓ Number of home vacancies are down</li> <li>✓ Property maintenance is up</li> <li>✓ Selling of the right-of-way</li> <li>✓ HOA cost management/turning to self-management</li> <li>✓ Club house renovations</li> <li>✓ Creating welcome packets</li> <li>✓ Crime watch/community engagement</li> </ul>	<p>Why?</p> <ul style="list-style-type: none"> <li>✓ Quiet</li> <li>✓ Accessibility to major thoroughfare</li> <li>✓ It’s an older established neighborhood</li> <li>✓ It’s one of the last (maybe the last) neighborhood to have a 1:3 ratio of land</li> <li>✓ The houses aren’t cookie cutter</li> <li>✓ Homes are well maintained</li> <li>✓ Low tax assessments</li> </ul> <p>Why not?</p> <ul style="list-style-type: none"> <li>➤ There are strong HOA rules</li> <li>➤ There is limited access to public transportation</li> <li>➤ There is misinformation/bad information on neighborhood schools</li> </ul>	<ul style="list-style-type: none"> <li>★ More community involvement</li> <li>★ Identify and create understanding of area resources <ul style="list-style-type: none"> <li>-Handyman services</li> <li>-Golf courses</li> <li>-Employment services</li> <li>-Financial services</li> </ul> </li> <li>★ Continuous community improvements <ul style="list-style-type: none"> <li>-Clubhouse</li> <li>-Walking trail</li> <li>-Play ground</li> <li>-Front entrance</li> <li>-Pet waste stations</li> <li>-Updating covenants</li> </ul> </li> </ul>

<p>Where We Were (continued)</p> <p>Worst Past Moments</p> <ul style="list-style-type: none"> <li>➤ Lack of respect for community property</li> <li>➤ Involvement from different community members</li> <li>➤ Had a period where crime was up</li> <li>➤ Dark “hidden” streets</li> <li>➤</li> </ul>		
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### 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:**

**A diverse community working to cultivate a greater quality of living.  
Community involvement...Ageless appeal...Connecting resources.**

### 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 using 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.
  - Possible priorities/actions items to get us closer to our vision.
- Place the sticky notes on the wall.



- Organize the ideas by natural categories, once everyone agrees on the groups, give each one a name.

This activity led us to the following categories and action items being identified as important within our community:

<b>Community Involvement</b>	<b>Community Improvement</b>	<b>Community Resources</b>
<ul style="list-style-type: none"> <li>• Digital welcome packet</li> <li>• Better/more communications</li> <li>• More activities for kids/teens/families</li> <li>• Voting</li> <li>• Community interaction-outreach</li> <li>• Clean-up day</li> <li>• Have a party</li> <li>• Forming ad hoc committees</li> <li>• Form clubs               <ul style="list-style-type: none"> <li>– -Walk/run</li> <li>– -Swim</li> <li>– -Coupons</li> </ul> </li> <li>• Add board members</li> <li>• Community clean street days</li> <li>• Community help your day</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising</li> <li>• Update HOA Covenants</li> <li>• Front/back entrance</li> <li>• Pool</li> <li>• Upgrade facilities</li> <li>• Clubhouse renovation</li> <li>• Nature walk</li> <li>• Upgrade playground</li> </ul>	<ul style="list-style-type: none"> <li>• Connecting with City resources (need one person per need)</li> <li>• Education</li> <li>• Child &amp; Teen summer program connection</li> <li>• Contractor</li> </ul>

Each participant was provided three (3) stickers to be used for voting. Stickers could be placed all on one or two items or shared amongst all of the ideas identified. The three categories receiving the most votes are the strategic priorities that are most important for us to begin working on to achieve our vision, these are:

1  
Communications

2  
Update HOA covenants

3  
Create a resource guide

Action Items for 2014-2015

The three activities selected as most impactful toward achieving our strategic priorities are activities in 2014-2015 are:

1  
Create a communications plan

2  
Reach out to other HOAs to review their covenants

3  
Plan an activity



**2014 Neighborhood Board Retreat Summary**

**Turtle Rock**

**OUR VISION:**

Turtle Rock

A diverse community working to  
cultivate a greater quality of living.

Community involvement...Ageless appeal...Connecting resources.

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

1

Community Involvement

2

Community Improvement

3

Community Resources

**IN 2014-2015, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:**

1

Create a  
communications  
plan

2

Update the current  
HOA covenants

3

Create an activity

## Resources to Get Started

Project	Getting Started	Resources
<p><b>Project #1</b> Create a communications plan</p>	<ul style="list-style-type: none"> <li>Survey residents about what type of communication platform they would prefer to use (newsletters, website, meetings, flyers, social media)</li> <li>Decide which types of communication would be most beneficial for neighbors</li> </ul>	<p>Online survey tool: <a href="http://www.surveymonkey.com">www.surveymonkey.com</a></p> <p>Sample neighborhood survey: <a href="http://www.santacruzneighbors.com/files/form_sample_neighborhoodsurvey.pdf">http://www.santacruzneighbors.com/files/form_sample_neighborhoodsurvey.pdf</a></p> <p>Types of neighborhood communication: <a href="http://www.neighborhoodlink.com/article/Association/Effective_HOA_Communication">http://www.neighborhoodlink.com/article/Association/Effective_HOA_Communication</a></p> <p>Additional examples of communication: <a href="http://www.mrsc.org/subjects/governance/participation/comtechniques.asp">http://www.mrsc.org/subjects/governance/participation/comtechniques.asp</a></p>
	<ul style="list-style-type: none"> <li>Get some additional guidance digital communication with neighbors</li> </ul>	<p>Nextdoor: Create a private social network for your neighborhood: <a href="https://nextdoor.com/about_us/">https://nextdoor.com/about_us/</a></p> <p>Local Resources for Neighborhoods: <a href="http://digitalcharlotte.org/">http://digitalcharlotte.org/</a></p> <p>Knight School of Communication at Queens University: <a href="http://www.queens.edu/Academics-and-Schools/Schools-and-Colleges/Knight-School-of-Communication/Spotlight-Stories/How-Do-Neighborhoods-Communicate.html">http://www.queens.edu/Academics-and-Schools/Schools-and-Colleges/Knight-School-of-Communication/Spotlight-Stories/How-Do-Neighborhoods-Communicate.html</a></p>
<p><b>Project # 2</b> Reach out to other HOAs to review their covenants</p>	<ul style="list-style-type: none"> <li>Learn more about HOA covenants and how they govern</li> <li>Check for contact info for adjacent Neighborhood Organizations</li> </ul>	<p>HOA Covenant Basics <a href="http://realtymag.com/consumeradvice/hoadvice1/item/9189-20051221_ccrs">http://realtymag.com/consumeradvice/hoadvice1/item/9189-20051221_ccrs</a></p> <p>Neighborhood Organization Contact List <a href="http://charmack.org/city/charlotte/planning/AreaPlanning/NeighborhoodOrganizationalList/Pages/home.aspx">http://charmack.org/city/charlotte/planning/AreaPlanning/NeighborhoodOrganizationalList/Pages/home.aspx</a></p>
<p><b>Project #3</b> Create an activity</p>	<ul style="list-style-type: none"> <li>Brainstorm about what types of activities would benefit your neighborhood</li> </ul>	<p>Fun neighborhood activity ideas: <a href="http://www.twp.woodbridge.nj.us/LinkClick.aspx?fileticket=3x%2BTKcclPDk%3D&amp;tabid=214&amp;mid=824">http://www.twp.woodbridge.nj.us/LinkClick.aspx?fileticket=3x%2BTKcclPDk%3D&amp;tabid=214&amp;mid=824</a></p> <p>List of additional activities: <a href="http://www2.bgky.org/neighborhoods/pdf/celebrate_safe_communities_party_ideas.pdf">http://www2.bgky.org/neighborhoods/pdf/celebrate_safe_communities_party_ideas.pdf</a></p>

