July 14, 2018

Apple Tree Village Association

Hosted by City of Charlotte Housing & Neighborhood Services at
Central Piedmont Community College
Background

On Saturday, July 14, 2018, the board members of the Apple Tree Village participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at Central Piedmont Community College. The following board members and/or community members participated in the retreat:

- Debbie Cestaro
- Judy Reeves
- Sharbara Ellis
- Ingrid Littler
- Wendy Laird

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 match credit toward a Neighborhood Matching Grant (NMG) to help execute one of the projects we identified. More information on the grant program can be found online at [http://charlottenc.gov/nmg](http://charlottenc.gov/nmg).

To receive this credit we’ll submit our completed Vision to Action Idea Development Plan Workbook with our NMG request. This credit will expire following the September 1, 2019 NMG application deadline.

Process

Our board retreat was conducted by trained facilitators tasked 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.

<table>
<thead>
<tr>
<th>Where We Were: Reflecting on our past, what were some of the best/worst moments?</th>
<th>Where We Are: Why would or wouldn’t a person/business want to move into our community?</th>
<th>Where We Want to Be: If you could make 3 wishes to make our community flourish, what would they be?</th>
</tr>
</thead>
</table>
| **Best** | **Would** | o Affordability  
 o Proximity to public transportation  
 o Future plans for Monroe Road corridor  
 o New developments  
 o Quiet and secluded  
 o Large units  
 o Nice neighbors  
 o Overall appearance; looks old  
 o HOA is weak  
 o Need for money for maintenance by HOA  
 o Crime  
 o Bus line causing trespassing and abandoned cars  
 o HOA fees have risen (water and landscaping fees)  | o Resident engagement  
 o Lower number of rentals  
 o Repairs to units  
 o Generate enough funds to renovate and maintain outdoor areas  
 o Clubhouse renovation  
 o Tennis court renovation  
 o Community involvement  
 o Additional landscaping in common spaces |
| o Beautiful grounds  
 o Owner occupied  
 o Adult population  
 o Police presence was strong  
 o More community pride  
 o Location  
 o NMG to fix entry sign  
 o Projects that improved the community: painting unit #’s, pressure washing  | | |
| **Worst** | **Would not** | o Too many investors  
 o Percentage of rentals  
 o Too many investors  
 o Outsiders using amenities  
 o Higher crime & drug issues  
 o Low community involvement  
 o Poor HOA rules  
 o Disrespectful neighbors to community grounds  | |
| o Too many investors  
 o Percentage of rentals  
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 o Higher crime & drug issues  
 o Low community involvement  
 o Poor HOA rules  
 o Disrespectful neighbors to community grounds  | | |
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:

*Apple Tree Village* is an established townhome community, in a unique and natural setting, close to uptown, boasting spacious living, with proud and engaged neighbors.

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:

- **Category 1: HOA Goals**
  - Increase homeownership
  - Lower Number of rentals
  - Have a third party assist with HOA financials
  - Fundraising options- charging for use of community amenities
  - Improve communication between the community and the HOA

- **Category 2: Safety**
  - Complete Neighborhood Watch process with CMPD

- **Category 3: Community Improvements**
  - Common area improvements
  - Entrance sign garden improvements
  - Tree trimming
  - Improvements to outside of units
  - Clean up debris from old projects (bricks)
  - Tennis court renovation or removal
  - Clubhouse improvements
  - Pipe mapping for water line breaks

- **Category 4: Community Engagement**
  - Increase community involvement
  - Renter inclusion programs
  - Community engagement activities
  - Communication Toolkit

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. Within these three categories, there were three activities selected as most impactful toward achieving our strategic priorities.

The strategic priorities and activities are summarized on the following page.
Apple Tree Village Association

OUR VISION:

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

- **HOA Goals**
- **Community improvement**
- **Community engagement**

IN 2018-2019, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

- Increase homeownership through HOA (addendums to documents) in 2018
- Clubhouse Improvement project (NMG 2018)
- Create a communication toolkit for early 2019
Please list any parking lot items or additional activities beyond the initial 3 here.

1. Drainage issues
   a. Address drainage issues and broken water pipes (map them)
   b. Connect with Charlotte Water for potential resource
   c. Connect with former NMG applicant whose project included mapping old water lines for future repairs
      i. Contact Kirsty Sanchez at Kirsty.Sanchez@charlottenc.gov or (704) 336-4594
2. Find a nonprofit legal clinic to support their HOA addendums around the percentage of owner occupied units and rentals
3. Attend an upcoming NMG workshop
   a. Learn about workshops at http://charlottenc.gov/HNS/CE/NMG/Pages/default.aspx
4. Contact information for the Charlotte Community Tool Bank (Clubhouse renovation project)
   a. Learn about the Toolbank at www.charlotte.toolbank.org
   b. Contact: Maureen Krueger, maureen.krueger@toolbank.org or (704) 469-5800

Resources to Get Started- You’ve rolled up your sleeves and established your vision. We have compiled resources that may assist your organization in achieving your goals on our Neighborhood Training Programs and Resources website. We have identified resource categories that may be applicable to your projects below; please do not hesitate to explore more categories as you undertake your work! Links and contact information are provided for information only and are subject to change.

<table>
<thead>
<tr>
<th>Project</th>
<th>Potential Resource Categories of Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase homeownership through HOA (addendums to documents) in 2018</td>
<td>Board Development</td>
</tr>
<tr>
<td>Clubhouse Improvement project (NMG 2018)</td>
<td>Neighborhood Identity; Recreation</td>
</tr>
<tr>
<td>Create a communication toolkit for early 2019</td>
<td>Communication</td>
</tr>
</tbody>
</table>

Your community is located within Charlotte’s Southeast Service Area. Your staff contacts for following up and community assistance is:

Kim Barnes, Southeast Community Engagement Manager
kbarnes@charlottenc.gov or 704-336-8408