



CHARLOTTESM

NEIGHBORHOOD BOARD RETREAT



July 14, 2018

Avalon at Mallard Creek Townhomes

Hosted by City of Charlotte Housing & Neighborhood Services at

Central Piedmont Community College

Avalon at Mallard Creek Townhomes

2018 Board Retreat

Background

On Saturday, July 14, 2018, the board members of the Avalon at Mallard Creek Townhomes 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:

Cathy Dowell-Vickers
Henry Vickers
Willie Barfield

Michelle Wright
Hemant Phade



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>.

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.

Where We Were: Reflecting on our past, what were some of the best/worst moments?	Where We Are: Why would or wouldn't a person/business want to move into our community?	Where We Want to Be: If you could make 3 wishes to make our community flourish, what would they be?
<p>Positive</p> <ul style="list-style-type: none"> • Regularly held community events and social engagements <p>Challenges</p> <ul style="list-style-type: none"> • Financially troubled – no reserves • Poor communication • Poor property management 	<p>Positive</p> <ul style="list-style-type: none"> • Financially stable – reserves are growing • Making improvements to structures, roads, and streets • Use better vendors • Location <p>Challenges</p> <ul style="list-style-type: none"> • Ratings of schools • Use of clubhouse • Need to increase community involvement • Increase market value/resale 	<ul style="list-style-type: none"> • 100% of HOA fees paid • Renting out clubhouse and clubhouse additions • Increased community involvement • Beautification efforts • Increased communication between renters and homeowners • Water bill management • Youth outreach

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:

Avalon at Mallard Creek connects our neighborhoods in the purpose of preserving and improving our community.

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:

- **Beautify & Maintain**
 - Building repairs – roofs, gutters, door jambs
 - Resurface roads
 - Improve neighborhood appeal
 - Improve the behavior or residents disposing of trash
 - Repair air conditioning in clubhouse

- **Communication**
 - Create an atmosphere of open communication with residents
 - Currently leading by example and communicating with neighbors
 - Currently out newsletters to keep the community updated

- **Board Management**
 - Prioritize responsibly
 - Increase reserves
 - Create sub committees (engage residents)
 - Leverage external knowledgeable resources
 - Effective communication and project assignment
 - Innovative idea exchange

- **Community Engagement**
 - Mobile healthcare services
 - Community events (more community meetings)
 - Hold community parties
 - Utilize clubhouse
 - Motivate more men to play an active role in the community
 - Hold an open house where residents can learn how they can be involved in the community
 - Shredding event



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.

2018 Neighborhood Board Retreat Summary

Avalon at Mallard Creek

OUR VISION:

Avalon at Mallard Creek connects our neighborhoods in the purpose of preserving and improving our community.

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

1

**Beautify &
Maintain**

2

**Board
Management**

3

**Community
Engagement**

IN 2018-2019, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:

Resurface private streets
by the end of 2018.

Bids to be submitted 7/30-8/14. Select contractor on 8/15. Begin work by 9/1.

Define strategy to increase
board financial reserves by
November 2018

Budget review by 10/2018 and analysis by 11/2018. Analysis will determine whether HOA should increase dues, reallocate funds, or assess.

Hold 2 community events
by May 1, 2019

Possibly a fall/winter mixer and spring ice cream social.

Bonus Goal: Adopt a street(s) through Keep Charlotte Beautiful Adopt-a-City Street program by December 31, 2018.

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.

Project	Potential Resource Categories of Interest
Resurface private streets by the end of 2018.	Beautification
Define strategy to increase board financial reserves by November 2018	Board Development
Hold 2 community events by May 1, 2019	Welcoming & Engaging Neighbors
Adopt a street(s) through Keep Charlotte Beautiful Adopt-a-City Street program by December 31, 2018.	http://charlottenc.gov/HNS/CE/KCB/Pages/Adopt-A-City-Street.aspx

Your community is located within Charlotte's Northwest Service Area. Your staff contacts for following up and community assistance are:

Cherie Grant, Northwest Community Engagement Liaison	Randy Harris, Northwest Community Engagement Manager
Cherie.Grant@charlottenc.gov or 704-336-3322	rharris@charlottenc.gov or 704-432-1579

