



February 08, 2020

Belmar Place HOA

Hosted by City of Charlotte Housing & Neighborhood Services at

Goodwill Opportunity Campus

Belmar Place HOA 2020 Board Retreat

Background

On Saturday, February 08, 2020, the board members of the Belmar Place HOA participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at the Goodwill Opportunity Campus. The following board members and/or community members participated in the retreat:

• Marc Fregoe	• Fran Carr
• Evelyn Mabry	• Alicia Thompson
• Chris Smith	

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.

To receive this credit, we'll submit a copy of the Developing Your Ideas worksheets from the Neighborhood Board Retreat Participant Workbook (pages 14 – 17) with our NMG request. This credit will expire following the June 1, 2021 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>(+)</p> <ul style="list-style-type: none"> • Building a board – an opportunity to expand • 3 community events <p>(-)</p> <ul style="list-style-type: none"> • Lack of communications with residents in the past • Lack of amenities • HOA dues not being paid due to concerns with the developer • No many participating in meetings • Disgruntled long-term residents • Bad experience with developer 	<p>(+)</p> <ul style="list-style-type: none"> • 3 well received community events • One-year old board • Website • Annual meeting well received • Meet monthly vs. quarterly • More accountability and compliance • Good location • Increased communication <p>(-)</p> <ul style="list-style-type: none"> • There is no close grocery store • Crime (break-ins and drive by shootings) 	<ul style="list-style-type: none"> • Increased community participation • Add a playground • Build sense of community • Beautification

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 safe and beautiful place to call home.*

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:

Fill in the categories (large Post-Its) and associated ideas/action items, adding and deleting bullet points as necessary.

- Category 1 Additional Street Lights
 - Increase safety
 - Beautify the neighborhood
 - Increase accountability by having board and residents work together
- Category 2 Increase amenities by adding a playground
 - Respond to community request
 - Increase community involvement
 - Add value to the neighborhood
 - Opportunity to partner with corporations and neighborhood businesses in working on a Neighborhood Matching Grant
- Category 3 Obtain organizational development assistance
 - Create committee structure
 - Get help with action planning
 - Increase engagement
 - Increase partnership with management company involvement
 - Support from people as part of NMG match

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 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.



2020 Neighborhood Board Retreat Summary

Belmar Place

OUR VISION: *A safe and beautiful place to call home.*

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

1

Improve street lighting

2

Work on the playground project for beautification and resident engagement

3

Strengthen the organization by engaging organization development assistance

IN 2020-2021, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:

Apply for Neighborhood Matching Grant by March 2020 to improve street lighting

Is this goal SMART? Yes

Identify playground planners by April 1, 2020

Is this goal SMART? Yes

Compile a list of available resources that can assist with improving organizational development by Fall 2020

Is this goal SMART? Yes

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
Apply for Neighborhood Matching Grant by March 2020 to improve street lighting	Neighborhood Improvement
Identify playground planners by April 1, 2020	Neighborhood Improvement
Compile a list of available resources that can assist with improving organizational development by Fall 2020	Board Development

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

Aisha Abhus-Sabur, Northwest Community Engagement Liaison	Randy Harris, Northwest Community Engagement Manager
Aisha.Abhus-Sabur@charlottenc.gov or 704-336-3322	rgharris@charlottenc.gov or 704-432-2433

