July 15, 2017

Carmel Village II Homeowners Association

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

On Saturday, July 15, 2017, the board members of the Carmel Village II Homeowners Association participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at CPCC. The following board members participated in the retreat:

- Kim Fannon
- Pat Johanson
- Becky Royster
- Dorthy Wiland
- Marie Hinson
- Stephanie Nicholson
- Ralph Trezza

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 our completed Vision to Action Idea Development Plan Workbook with our NMG request. This credit will expire following the September 1, 2018 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>
| • Projects completed with NMG support (wood staining for pool, mailboxes)  
• Taking care of units (renters and owners)  
• No crime  
• Rt. 51 use to be one lane (is now two lanes- more access)  
• No communication  
• Plumbing issues  
• 2008 recession (high rate of foreclosures and HOA dues weren’t paid) | • Location, location, location (50 restaurants within ½ mile, one entrance)  
• Space/ great floor plans  
• Amenities | • Communication- everyone is involved  
• More community engagement  
• Get all the railings complete at one time  
• Security- fencing in community (safety) |
**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:**

*Carmel Village II is an affordable, clean and safe South Charlotte neighborhood with easy accessibility to all the Queen City has to offer.*

**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:

- **Infrastructure Projects**
  - Replace retaining walls
  - Meandering sidewalk- breezeway to CV1
  - Railing replacement front-end (HOA has already begun this work) and back
  - Street lights
  - Trash pick-up (cigarette butts)
  - Projects to keeps community a nice place

- **Communication**
  - Invent method of communication for all units
  - Periodic newsletter
  - Mandatory meeting with all landlords and tenants going over bylaws

- **Safety**
  - Community Watch program
  - Fence study for safety
  - Involvement by all units

- **Community Engagement**
  - Volunteers involvement in the community
  - Finding grants
  - Activities for community to get people together

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.
2017 Neighborhood Board Retreat Summary

Carmel Village II Homeowners Association

OUR VISION:
Carmel Village II is an affordable, clean and safe South Charlotte neighborhood with easy accessibility to all the Queen City has to offer.

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

1. Infrastructure Projects
2. Communication
3. Safety

IN 2017-2018, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

- Retaining Walls: Communicate the importance of completing existing grant project throughout CVII
- Contact CMPD to learn about Neighborhood Watch program, plan a meeting, and solicit volunteers
- Complete a list of contact information for all units—one point of contact for each building (utilize Calling Tree)
Please list any parking lot items or additional activities beyond the initial 3 here.

- Kim Barnes has been provided an updated map of Carmel Village II. She will provide to the neighborhood shortly.

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>Retaining Walls-Communicate the importance of completing existing grant project throughout CVII</td>
<td>Communication; Beautification</td>
</tr>
<tr>
<td>Contact CMPD to learn about Neighborhood Watch program, plan a meeting, and solicit volunteers</td>
<td>Public Safety; Welcoming &amp; Engaging Neighbors</td>
</tr>
<tr>
<td>Complete a list of contact information for all units-one point of contact for each building (utilize Calling Tree)</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