CHARLOTTE

2015 NEIGHBORHOOD BOARD RETREAT

Carmel Village II

Hosted by City of Charlotte Neighborhood & Business Services at CPCC Main Campus

Carmel Village II

2015 Board Retreat

Background

On Saturday, February 7th 2015, the board members of the Carmel Village II participated in a board retreat facilitated by the City of Charlotte, hosted at CPCC's Main Campus. The following board members participated in the retreat:

- Rob Pearce
- Jordan Pearce
- Kate Finger

- Roxanne Gillespie
- Rita Mullins

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.

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?
- Mailbox issues - Meeting new neighbors - Adding siding/adding retaining wall - Termite treatment/canopy - Landscape - Pot farm - Pot holes - Foreclosures - Fire - Dues low	- Location and Price - Surrounding amenities and on-site amenities - Floor plans - Owner/renter ratio - Exterior (roofs, painting, lighting) - Violations (lighting, trouble makers)	- More residents involved - Build reserves - New entrance - Accountability of owners regarding renters - Meeting with all owners

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 established community in South Charlotte that affords access to the best that Charlotte 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:

Financial
- Agreed upon assessment amount/raise HOA fees
- Incentivize owners to meet quorum
- Take advantage of resources – grants and Duke Energy
- Get approved assessment for reserve fund/ begin work to address items on our reserve study to show residents we are moving forward to take care of our major improvements

Community Involvement
- Improved owner participation
- More community involvement/encourage residents to participate on "committees" etc to clean up/spruce up our area/ get neighbors involved in community events
- Communication/newsletters to improve communication
- Multiple owner meetings
- Annual established picnic or community event other than board meeting
- Assign specific tasks to individuals

Physical Improvements
- Improved visual appearance
- Fix structural issues before cosmetic issues
- Tree planting
- Common area with grill and table to encourage residents to gather socially
- Pavement at entrance
- Landscape supervision/new landscapes to enhance community
- Energy audit to replace light fixtures

Other
- Dog DNA program
- Research Information
- Enforce R&R consistently

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 Community Involvement	2 Physical Improvements	3 Financial

Action Items for 2014-2015

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

Hold a special community event	Repair pavement at entrance and install landscaping	Address homeowner's fees and assessments

Carmel Village II

OUR VISION:

Carmel Village II is an established community in South Charlotte that affords access to the best that Charlotte has to offer.

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

1 Community Involvement	2 Physical Improvements	3 Financial

IN 2014-2015, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:

Hold a special community event

Repair pavement at entrance and install landscaping

Address homeowner's fees and assessments

Resources to Get Started

Project	Getting Started	Resources
Project #1 Hold a special community event	• Consider some unique event ideas. • Survey the community members to see what they may enjoy doing.	**Unique Neighborhood Event Ideas** http://neighbordays.com/ideas/ **Online survey tool:** www.surveymonkey.com **Sample neighborhood survey:** http://www.santacruzneighbors.com/files/form_sampleneighborhoods urvey.pdf
	• Get event planning tips	**Neighborhood Event Planning Toolkit** http://www.sdsynod.org/wp-content/uploads/2012/05/Block-Party-Kit.pdf **Charlotte Department of Transportation for information on street closure procedures and approval** http://charmeck.org/city/charlotte/Transportation/Pages/Home.aspx **Charlotte-Mecklenburg Police Department for sound permits** http://charmeck.org/city/charlotte/CMPD/Pages/default.aspx **Invite your City Council representative:** City Council Members: http://charmeck.org/city/charlotte/CityCouncil/MeettheCouncil/Pages/home.aspx
	• Apply for a Neighborhood Matching Grant for funding to host an event	**Neighborhood Matching Grants** http://charmeck.org/city/charlotte/nbs/communityengagement/nmg/Pages/default.aspx?NotFoundURL=http://charmeck.org/city/charlotte/nbs/communitycommerce/Pages/NMG.aspx&Referrer= **Contact: Atalie ZImmerman, 704-336-4594, azimmerman@charlottenc.gov**
Project # 2 Repair pavement at entrance and install landscaping	• Organize a neighborhood clean-up around the area of the entrance	**Tips for Organizing a Community Cleanup** http://lancaster.unl.edu/community/articles/organizecleanup.shtml **Keep Charlotte Beautiful has clean up supplies, grants and volunteers for cleanups** www.keepcharlottebeautiful.org
	• Learn more about landscaping	**How-to lessons at Lowes** http://www.lowes.com/cd_How+To+Library_615580068_ **Master Gardeners of Mecklenburg County** http://www.mastergardenersmecklenburg.org/

		Home Depot Workshops: http://workshops.homedepot.com/workshops/home?cm_mmc=SEM|THD|G|BT2|Resources&gclid=CJi3x9XeuMACFQ1p4AodDx0AmQ&gclsrc=ds **Pinterest has great ideas and tips for landscaping:** www.pinterest.com
	• Apply for a Neighborhood Matching Grant for funding	**Neighborhood Matching Grants** http://charmeck.org/city/charlotte/nbs/communityengagement/nmg/Pages/default.aspx?NotFoundURL=http://charmeck.org/city/charlotte/nbs/communitycommerce/Pages/NMG.aspx&Referrer= **Contact: Atalie ZImmerman, 704-336-4594, azimmerman@charlottenc.gov**
Project #3 Address homeowner's fees and assessments		**Budget Preparation Tips** http://www.neighborhoodlink.com/article/Association/Budget_Preparation_Tips **Neighborhood fundraiser ideas:** http://www.useful-community-development.org/how-to-fundraise.html **More fundraising ideas:** http://www.ehow.com/way_5208916_fundraising-ideas-neighborhood-association.html **Alternatives to HOA Assessments** http://realtytimes.com/todaysheadlines1/item/21090-19991216_assessments
Parking Lot: **Information on TreesCharlotte:** **http://treescharlotte.org/** **How to Apply for NeighborWoods Program:** http://charmeck.org/city/charlotte/nbs/communityengagement/Pages/NeighborWoods.aspx		

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