February 23, 2019

Carmel Woods Neighborhood Association

Hosted by City of Charlotte Housing & Neighborhood Services at
Goodwill Opportunity Campus
Background

On Saturday, February 23, 2019, the board members of the Carmel Woods Neighborhood Association 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:

Kirk Blumenstock      Greg Chase
Robin Tonelli         Jen Smolias
Millie Patterson      Sarah Knepp
Wesley Allen

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

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 moments included:  
- Openness  
- Kids  
- Core activities  
- Mentor / historical reference (Millie)  | Affordable “pocket” in the city  
- Good schools  
- Good neighbors  
- Safe  
- Great property values  
- Traffic light at Colony  
- Traffic  
- Beautification  
- Great Scott (?)  
- PayPal (set up)  
- Older property / upkeep and renovations  
- Social media  
- Formal voting for Board  
- School traffic  | Board structure  
- Need more help  
- School traffic  
- More “mortar” to fill the cracks of CWNA  
- Activities for all age groups  
- Food trucks  
- No strict association  
- Continue improvement  
- We are proud home owners  
- Renovate median  |
| Worst moments included:  
- Lack of communication  
- Not a lot of socials  
- Transient (homeowners)  
- No communication  
- No welcome committee  
- Starter homes / old homes  
- Bad (looking) homes at entrance  
- Ugly median  
- No rules / by-laws  |  |  |
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 Woods is a hidden gem in the heart of Southpark connecting neighbors with each other.

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:

- **Social Involvement / Building Relationships**
  - Oktoberfest
  - Food trucks
  - Haunted House
  - Chili cookoff
  - Driveway parties
  - 4th of July Parade
  - Determine as a Board how to gauge neighborhood interest in various social events
  - Adopt a street
  - Welcome basket
  - Yard sale
  - Spring clean-up
  - Meet and greet event
  - Neighbor meet up at a restaurant
  - Layout social event basic structure (RSVP, check-in, location, funding, alcohol, management, etc.)
  - Determine structure of getting RSVP’s and how to manage lack of response
  - Community input for social events
  - Drive traffic to community Facebook
  - Utilize Facebook as key source of community information
  - Spring BBQ at Carmel Park
  - Holiday decorating contest
  - Summertime cookout
  - Movie night

- ** Beautification**
  - Power buying (pooling purchasing power) (e.g. landscaping, mail boxes, window cleaning, new driveways, power washing, tree work)
  - Maintain front entrance / median
  - Improve school drop-off area
  - List of vendors and contractors that have been vetted
  - Determine how to handle neighbors who don’t keep up property / escalation criteria
  - Clean street signs
  - Committee Assistance Program (CAP)
  - Yard of the month

- **Board Structure**
  - Board roles and commitments
  - Commitment from all board members for two meetings: 1) Board retreat (?), and 2) Entire community and the Board
  - Financial cycle / annual dues
  - Community bulletin board
  - Formal organization? And other structures? LLC (?)? Any liability to consider?
  - Monthly (periodic) newsletter
  - Board members
  - Vision, mission, frequency
  - Directory

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.
Carmel Woods Neighborhood Association

OUR VISION:

Carmel Woods is a hidden gem in the heart of Southpark connecting neighbors with each other.

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

1. Social Involvement / Building Relationships
2. Beautification
3. Board Structure

IN 2019-2020, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Hold three new neighborhood social events by March 2020.

Improve school drop-off area and recruit/appoint head of Safety Committee by March 2020.

Adjust and approve board roles/commitments and financial processes by March 2020.
Please list any parking lot items or additional activities beyond the initial 3 here.

- CMPD.org
  - [https://charlottenc.gov/CMPD/Pages/default.aspx](https://charlottenc.gov/CMPD/Pages/default.aspx)
- Do solicitors still need a Solicitor License?
  - [https://www.sosnc.gov/divisions/charities/licensing](https://www.sosnc.gov/divisions/charities/licensing)
- Officer Botzenmayer: 704-534-6731, rbotzenmayer@cmpd.org
- Middle school traffic is problematic
- Trash associated with school
- Delegation of tasks does not match Board structure
- Charlotte Department of Transportation: Street sign cleaning
  - Submit request online: [https://servicerequest.charlottenc.gov/service/STRSIGN](https://servicerequest.charlottenc.gov/service/STRSIGN)
- How can we plan for events when people don’t R.S.V.P.?
  - Send reminders early and often.

**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>
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<tbody>
<tr>
<td>Hold three new neighborhood social events by March 2020.</td>
<td>Welcoming &amp; Engaging Neighbors</td>
</tr>
<tr>
<td>Improve school drop-off area and recruit/appoint head of Safety Committee by March 2020.</td>
<td>Beautification; Public Safety</td>
</tr>
<tr>
<td>Adjust and approve board roles/commitments and financial processes by March 2020.</td>
<td>Board Development</td>
</tr>
</tbody>
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Your community is located within Charlotte’s Southeast Service Area. Your staff contacts for following up and community assistance are:

<table>
<thead>
<tr>
<th>Kim Barnes, Southeast Community Engagement Manager</th>
<th>Elliott Royal, Southeast Community Engagement Liaison</th>
</tr>
</thead>
<tbody>
<tr>
<td>k Barnes@ charlottenc.gov  or 704-336-8408</td>
<td><a href="mailto:Elliott.Royal@charlottenc.gov">Elliott.Royal@charlottenc.gov</a>  or 704-336-1502</td>
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</tbody>
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