



CHARLOTTE

2015 NEIGHBORHOOD BOARD RETREAT



Country Club Heights

Hosted by City of Charlotte Neighborhood & Business Services at UNC Charlotte Center City

Country Club Heights

2015 Board Retreat

Background

On Saturday July 18, 2015, the board members of the Country Club Heights participated in a board retreat facilitated by the City of Charlotte, hosted at UNC Charlotte Center City. The following board members participated in the retreat:

- Nicole Kenney Joseph
- Curtis
- Will
- Brittany Bernado
- Scott Gartlan
- Patrick Anderson



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?
<ul style="list-style-type: none"> • Original homeowners set foundation • Transformed HOA thoughts about neighborhood involvement/leadership • Leadership evolved 	<ul style="list-style-type: none"> • Strong Neighborhood Organization and Homeowners Association • Strong branding • Good neighborhood identity and sense of community • High level of community involvement • Negative perception of Eastway/Shamrock corridor • Not as notable as Plaza-Midwood or NODA • Lack of business presence 	<ul style="list-style-type: none"> • Continuous informal and formal engagement between neighborhood organization and residents • Clearer brand or neighborhood identity • Identify, encourage, develop and support emerging neighborhood leaders to focus on vision, purposeful actions and clear communications

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:

Country Club Heights is an established mid-century neighborhood on the East side where neighbors are proud to live, that strives to celebrate our diverse culture by committing to quality schools, green space, walkability and sense of 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:

- **Communication and involvement**
 - Acknowledging who paid dues
 - Social events to meet neighbors
 - Newsletter
 - Welcome packets for new neighbors
 - Supporting our schools
 - Crime watch
 - Volunteer opportunities
- **Ideas to enhance Neighborhood**
 - Jane's Walk
 - Festival
 - Coffee stand for neighborhood
 - Neighborhood beautification
 - Community garden
 - Enhance greenspace
 - Beautification
 - Creative activities/engagement/events
- **Developing neighborhood leadership**
 - Partnerships with City/County departments
 - More intentional leadership
 - Strong Board
 - Set 10-year strategic plan
- **Improve communications and define branding**
 - Signage
 - Build reputation
 - Create 'motto' and marketing plan
 - Website improvements
 - Improved branding
- **Promote community engagement and involvement**
 - Increase membership
 - Little Free Libraries
 - Neighborhood events

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:



Action Items for 2015-2016 The three activities selected as most impactful toward achieving our strategic priorities are activities in 2015-2016 are:



2015 Neighborhood Board Retreat Summary

Country Club Heights

OUR VISION:

Country Club Heights is an established mid-century neighborhood on the East side where neighbors are proud to live, that strives to celebrate our diverse culture by committing to quality schools, green space, walkability and sense of community.

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

1

Developing Neighborhood

2

Promote Community
Engagement and Involvement

3

Improve Communications and
Define Branding

IN 2015-2016, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Be more intentional
leadership pipeline for
neighborhood board

Host more
Neighborhood Events

Improve website and
Branding

<p>Project #1</p> <p>Be More intentional with leadership pipeline for neighborhood board</p>	<ul style="list-style-type: none"> • Organize a meeting to identify individuals that may have an interest in neighborhood leadership 	<p>Increase neighborhood participation: http://atlantahoamanagement.wordpress.com/2011/09/27/how-to-increase-attendance-or-participation-in-homeowner-committees/</p>
<p>Project # 2</p> <p>Host neighborhood events</p>	<ul style="list-style-type: none"> • Develop/send out a survey for neighbors for interest and support of an event 	<p>Online survey tool: www.surveymonkey.com Sample neighborhood survey: http://www.santacruzneighbors.com/files/form_sampleneighborhoodsurvey.pdf</p> <p>Neighborhood Event Planning Toolkit http://www.sdsynod.org/wp-content/uploads/2012/05/Block-Party-Kit.pdf</p>
	<ul style="list-style-type: none"> • Committee Development 	<p>How to organize a committee: http://www.mycommittee.com/BestPractice/Committees/Startinga-committee/tabid/244/Default.aspx</p>
<p>Project #3</p> <p>Improve website and branding</p>	<ul style="list-style-type: none"> • Identify information on website development 	<p>The Knight School http://www.queens.edu/knight</p>

Parking Lot Items

1. Redraw the NPA boundaries to accurately depict the Country Club Heights neighborhood. Currently, the NPA includes a large portion of other neighborhoods like Plaza-Midwood that ultimately impact CCH’s eligibility for Neighborhood Matching Grants.
 - Staff agrees and understands the neighborhoods position. The NPA boundaries are based on Census Block Groups, any further division would result in loss of ability to use Census data. We are able to evaluate some data at smaller scales. Please call 704 336-2175 for more information.
2. CCH needs to develop a strategy for succession planning for their board leadership.

Your community is located within Charlotte’s Northeast Service Area, your staff contact for following up and community assistance is:

Charlenea Duncan, Northeast Service Area Specialist
E-mail: csduncan@charlottenc.gov Phone: 704-336-2173

