

# FOREST RIDGE NEIGHBORHOOD ASSOCIATION

2012 BOARD RETREAT

HOSTED BY THE CITY OF CHARLOTTE AT  
FOUNDATION FOR THE CAROLINAS



2012

# FOREST RIDGE NEIGHBORHOOD ASSOCIATION

## 2012 BOARD RETREAT

### Background

On Saturday, July 14, 2012, the board members of the Forest Ridge Neighborhood Association participated in a board retreat facilitated by the City of Charlotte, hosted at Foundation For The Carolinas. The following board members participated in the retreat:

Richard Flanigan  
Shawn Lawrence  
Jim Shrum  
Mike Campanale  
Jerry Higginbotham



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
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Our board identified the following outcomes for the retreat:

- Direction for our next project
- 5 year plan
- Ways to enhance our property values
- Finding sources of funds and resources for future projects

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 an external facilitator, tasked to keep our conversations on-task, productive, and focused on achievable objectives. The process was designed to help us capture what was the best of the past, what is 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
- Where's the Energy – Energygram Exercise
- Project Planning Worksheet Review

## 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.



<b>Where We Were:</b> Reflecting on our past, what were some of the best/worst moments?	<b>Where We Are:</b> Why/why not would a person/business want to move into our community?	<b>Where We Want to Be:</b> If you could make 3 wishes to make our community flourish, what would they be?
<p>Negative:</p> <ul style="list-style-type: none"> <li>- Dilapidated buildings</li> <li>- Low morale</li> <li>- No commitment to homeowner's own projects</li> <li>- Shoddy landscaping</li> <li>- No financial resources for improvements</li> <li>- Pool not up to county standards</li> <li>- No unity on the board</li> </ul> <p>Positive:</p> <ul style="list-style-type: none"> <li>- Passing the special assessment</li> <li>- New board members</li> </ul>	<p style="text-align: center;"><b>Why</b></p> <ul style="list-style-type: none"> <li>- Much nicer, functional pool</li> <li>- Much improved landscaping/appearance</li> <li>- More community involvement</li> <li>- Unity of board on vision</li> <li>- Repaired, newly painted buildings</li> </ul> <p style="text-align: center;"><b>Why Not</b></p> <ul style="list-style-type: none"> <li>- Low capital, resources</li> <li>- Declined property values</li> <li>- Security issues</li> </ul>	<ul style="list-style-type: none"> <li>- Improved safety for the community</li> <li>- More child-friendly neighborhood</li> <li>- Ability to collect dues from homeowners</li> <li>- More of a hometown atmosphere</li> <li>- Know and respect your neighbors</li> <li>- Financial stability to address future issues (e.g. maintenance)</li> <li>- More homeowners becoming board members</li> </ul>

Based on this activity, our group identified shared values that would help us craft the vision for our community:

- Engaged in keeping our neighborhood strong
- We are:
  - o Friendly
  - o Respectful of people and property
  - o An enjoyable place to live
  - o Safe and secure
- We have:
  - o Solid property values



## 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:**

**OUR COMMUNITY WILL BE A MODEL NEIGHBORHOOD FOR OTHER COMMUNITIES.**

<p><b>WE ARE:</b></p> <ul style="list-style-type: none"><li>• <b>FRIENDLY</b></li><li>• <b>RESPECTFUL OF PEOPLE AND PROPERTY</b></li><li>• <b>AN ENJOYABLE PLACE TO LIVE</b></li><li>• <b>SAFE AND SECURE</b></li></ul>	<p><b>WE HAVE:</b></p> <p><b>SOLID PROPERTY VALUES</b></p>
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## 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.

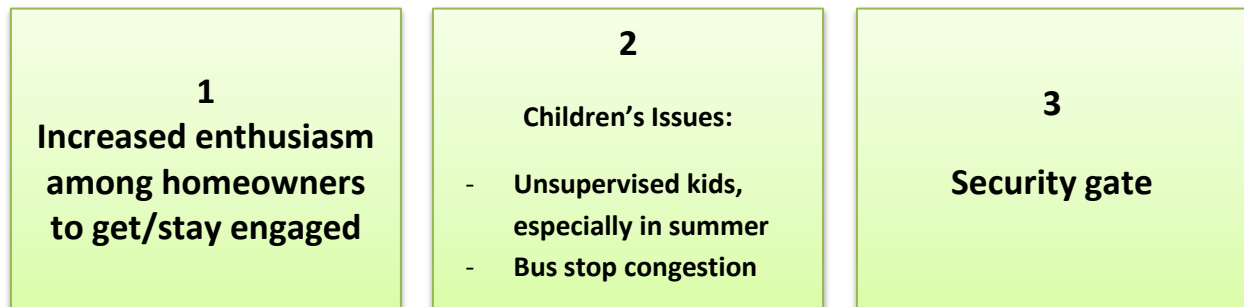
We started out thinking big and then narrowed down our focus. We utilized the Affinity Mapping Process, detailed below:

- 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.
  - Current realities keeping you from our vision.
  - Possible priorities/actions items to get us closer to our vision.
- Place the sticky notes on the chart paper.
- Organize the ideas by natural categories. Which ideas go together? Feel free to move any post-it note to another place. Move yours, move those of others, and feel free to do this. Do not be offended if someone moves yours to place where you feel it does not belong, just move it where you believe it goes.
- Once everyone agrees on the groups, give each one a name.

This activity led us to the following categories:

- Improved landscaping
- Better board
- Increased responsiveness to owners/tenants in the community
- Increased police presence
- Pool resurfacing to look better
- Homeowner participation

The board then identified the three priorities that were most important for us to begin working on to achieve our vision:



### Potential Projects

The board then began to brainstorm on possible projects or activities that aligned with their strategic priorities:

#### **Security Gate:**

- Get approval from apartment ownership
- Figure out/finalize how gate will be paid for
- Communicate to residents how gate will be operated

#### **Increased Enthusiasm Among Homeowners to Get/Stay Engaged:**

- Establish outreach to new and existing residents so that neighbors can get to know each other
- Organize social gatherings (including National Night Out)
- Explore development of networking list of neighborhood resources (so neighbors can help each other)
- Find out from NBS best practices/new ideas to engage residents

#### **Children Issues: Unsupervised Kids, Bus Stop Congestion**

- Meet with Simmons YMCA
- Meet with City Council regarding bus stop options
- Meet with new superintendent and CMS
- Find out what after school/summer programs are in the area
- Find out what after school/summer programs could be developed ( Freedom School Partners)
- Communicate program options to our neighbors including apartments

Action Items for 2012-2014

After identifying potential projects, the board voted on one project to pursue for each strategic priority in 2012-2014:

