February 18, 2017

The Gates at Quail Hollow

Hosted by City of Charlotte Neighborhood & Business Services at Goodwill Opportunity Campus
The Gates at Quail Hollow
2017 Board Retreat

Background

On Saturday, February 18, 2017, the board members of the Gates at Quail Hollow participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at the Goodwill Opportunity Campus. The following board members participated in the retreat:

Reenie Davis  Chuck Moore
Stephen Mullis  Laura Ann Crumpton

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
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>
| • Historic dairy farm prior to being developed  
• Desirable (location, new, attractive)  
• Positive perception (professional/successful people live in development)  
• Community-oriented  
• Well-kept grounds/green space | • Premium location  
• Pet-friendly  
• Valuable property  
• Aging property  
• High traffic congestion  
• Lacking community orientation/engagement  
• Green space needs updating | • Improved and modernized communications  
• Build cash reserves  
• Improve property value  
• Established sense of community |
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:**

The Gates at Quail Hollow strives to nurture a friendly and welcoming community that enhances its natural beauty and value – South Charlotte’s hidden treasure!

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:

- **Finances**
  - Build cash reserves
  - Working out a financial plan for future expenses – roof, paving, etc.
  - Identify hidden resources
  - Form Finance Committee
  - Raise more revenue

- **Engagement**
  - Engagement activities so neighbors can meet each other
  - Engage renters
  - Community events
  - Organize events
  - Form Welcoming Committee

- **Policy/Procedures/Governance**
  - Establish solid procedures
  - Become familiar with provisions of governing documents
  - Committees to help reach goals
    - Communication
    - Property beautification

- **Website**
  - Updated with contact info and community activities listed
  - Make sure we have Courtyard Captains
  - Update website (redesign and assign responsibility)
  - Establish Communications Committee to improve community information awareness

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.
The Gates at Quail Hollow

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

1. Build Reserves
2. Enhance Communication
3. Maintain and Improve Property

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

- Develop long-range financial plan based on current Treasurer’s analysis and recommendations
- Develop communications plan
- Develop immediate landscape/visual enhancement plan
Please list any parking lot items or additional activities beyond the initial 3 here.

- Web design/update
- Exploring opportunities for additional revenue: Club House, ways to benefit from Golf Tournament. See Board Development category on resource website noted below.
- NBS Area Supervisor contact information. Please see Service Area staff below and visit Code Enforcement service area website to identify Code staff.
- Board training opportunities. Possible opportunities include the Junior League’s Get on Board Program as well as City of Charlotte training opportunities found at charlottenc.gov/neighborhoodtraining (updated frequently—of particular interest may be the Charlotte Neighborhood Leadership Orientation being offered on April 19th).

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>Develop long-range financial plan based on current Treasurer’s analysis and recommendations</td>
<td>Board Development</td>
</tr>
<tr>
<td>Develop communications plan</td>
<td>Communication</td>
</tr>
<tr>
<td>Develop immediate landscape/visual enhancement plan</td>
<td>Beautification</td>
</tr>
</tbody>
</table>

Your community is located within Charlotte’s Southwest Service Area. Your staff contacts for following up and community assistance are:

<table>
<thead>
<tr>
<th>Millicent Powell, Southwest Community Engagement Liaison</th>
<th>Eugene Bradley, Southwest Community Engagement Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:mepowell@charlottenc.gov">mepowell@charlottenc.gov</a> or 704-432-6814</td>
<td><a href="mailto:ebradley@charlottenc.gov">ebradley@charlottenc.gov</a> or 704-432-1579</td>
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