



**CHARLOTTE.**

# 2016 NEIGHBORHOOD BOARD RETREAT



## Mallard Trace HOA

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

# Mallard Trace HOA

## 2016 Board Retreat

### Background

On Saturday, July 16th, 2016, the board members of the Mallard Trace participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at UNC Charlotte Center City. The following board members participated in the retreat:

- Bob May
- Kerry Carrington
- Rao Kommareddi
- Rod Frye
- Randy Burdette



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 match credit toward a Neighborhood Matching Grant (NMG) to help execute one of the projects we identified.

To receive this credit we'll submit our completed Vision to Action Idea Development Plan Workbook with our NMG request. This credit will expire following the September 1, 2017 NMG application deadline.

### 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.

<b>Where We Were:</b> Reflecting on our past, what were some of the best/worst moments?	<b>Where We Are:</b> Why would or wouldn't 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?
<ul style="list-style-type: none"> <li>• New street lights</li> <li>• 99% HOA dues paid</li> <li>• Welcome packet</li> <li>• Trees on most lots were banded in each of the last two years</li> </ul>	<ul style="list-style-type: none"> <li>• HOA fee consistent &amp; low</li> <li>• Convenient gyms, shops, hospital, schools, BLE...</li> <li>• Diversity &amp; family friendly s</li> <li>• Affordable large lots with trees</li> <li>• Established neighborhood</li> <li>• Google Fiber</li> <li>• Schools mixed scores</li> <li>• Greenway &amp; park are very accessible, but no sidewalks</li> <li>• Access to public transportation could be improved</li> <li>• Lack of club house, pool, etc. – but neighborhood nearby allows access with membership</li> <li>• Close by the YMCA</li> </ul>	<ul style="list-style-type: none"> <li>• Website improvements</li> <li>• Sidewalks</li> <li>• Entrance enhancement</li> <li>• Extend the sprinkler system</li> <li>• Mallard Creek tree maintenance</li> <li>• Recognition-yard of the year, workshop</li> <li>• Diversity</li> <li>• Communication</li> <li>• Active participation</li> <li>• More access</li> <li>• Continuation of tree banding</li> </ul>

## 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:

*Enhancing our safe, beautiful, and family friendly environment with neighbors who support 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:

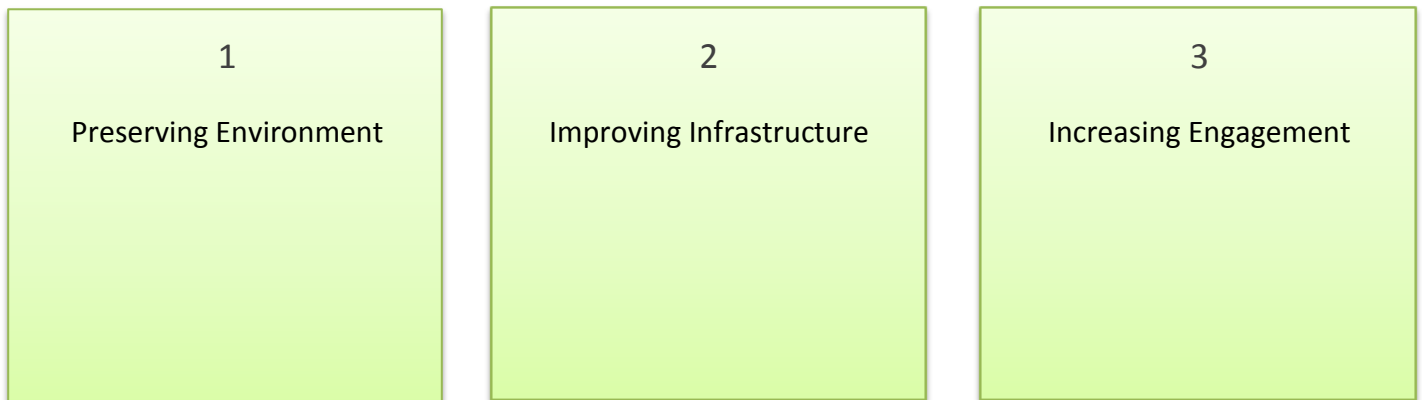
- Grab some sticky notes from the table. Keeping the vision statement in mind, write down as many of the following as you can think of, one per sticky note:
  - Current action items getting you closer to our vision.
  - Possible priorities/actions items to get us closer to our vision.
- Place the sticky 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:

- **Engagement:** Update website, improve communication of nearby amenities, increase neighborhood participation in all categories, Las Vegas Night to raise funds for projects, encourage children’s activities, encourage 40% resident participation rate in activities
- **Infrastructure:** Speed bumps (two post-its), sprinkler system, front entrance beautification, update playground, park entrance, improve park equipment and landscape
- **Environment:** Adopt-A-Stream, Adopt-A-Street & clear storm drains, trim trees on Mallard Creek Rd (two post-its), continue tree banding (two post-its)
- **Workshops:** Workshop on increasing home value, workshop on lawn maintenance (two post-its)

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 2016-2017** The three activities selected as most impactful toward achieving our strategic priorities are activities in 2016-2017 are:



**Replacement Project 1:** Maintain neighborhood trees through annual tree banding by neighborhood volunteers and matching grant, and pruning of street trees in conjunction with City Tree Management

**2016 Neighborhood Board Retreat Summary**

**Mallard Trace HOA**

**OUR VISION:**

*Enhancing our safe, beautiful, and family friendly environment with neighbors who support each other.*

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

1  
Preserving Environment

2  
Improving Infrastructure

3  
Increasing Engagement

**IN 2016-2017, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:**

Investigate Adopt-A-Stream program, recruit volunteers for 3 clean-ups, have a speaker at a meeting talk about environment to encourage participation, & post on website

Project Leader: Kerry

Redesign entrance (explore and identify entrance area enhancements), plan how it will look, and apply for a Neighborhood Matching Grant

Project Leader: Rao

Update the website with info on activities, amenities that are nearby, HOA fees, basic info on number of homes lot size, schools, etc. with links

Project Leader: Bob

**Replacement Project 1:** Maintain neighborhood trees through annual tree banding by neighborhood volunteers and matching grant, and pruning of street trees in conjunction with City Tree Management

Please list any parking lot issues or items here:

Do a combined retreat with neighborhoods next door, so we can work together on issues

City tree maintenance along Mallard Creek Rd. *Service Area staff will follow up on this concern.*



**Resources to Get Started**- You've rolled up your sleeves and established your vision. The resources below may assist your organization in achieving your goals. Links and contact information are provided for information only and are subject to change.

Project	Getting Started	Resources
<p><b>Project #1</b></p> <p>Investigate Adopt-A-Stream program, recruit volunteers for 3 clean-ups, have a speaker at a meeting talk about environment to encourage participation, &amp; post on website</p>	<ul style="list-style-type: none"> <li>Research Adopt-A-Stream</li> </ul>	<p><b>Adopt-A-Stream:</b>  <a href="http://charmeck.org/stormwater/VolunteerGetInvolved/pages/adopt-a-streamprogram.aspx">http://charmeck.org/stormwater/VolunteerGetInvolved/pages/adopt-a-streamprogram.aspx</a></p>
	<ul style="list-style-type: none"> <li>Recruit volunteers</li> </ul>	<p><b>Set up a conference call option for meetings:</b>  <a href="http://www.freeconferencecall.com">www.freeconferencecall.com</a></p> <p><b>Nextdoor: Create a private social network for your neighborhood (promote opportunities via this venue):</b>  <a href="https://nextdoor.com/about_us/">https://nextdoor.com/about_us/</a></p> <p><b>Yard Signs: Make signs to announce meetings/events with FastSigns® reusable yard signs:</b>  <a href="http://www.fastsigns.com/sg-yard-signs/Yard-Signs">http://www.fastsigns.com/sg-yard-signs/Yard-Signs</a></p> <p><b>Mail Chimp: Free online newsletter creator to announce events:</b>  <a href="http://www.mailchimp.com">www.mailchimp.com</a></p> <p><b>Meetings tips for neighborhoods:</b>  <a href="http://nacok.org/association-tools/effective-meetings/">http://nacok.org/association-tools/effective-meetings/</a>  <a href="http://www.neighborhoodlink.com/article/Association/Effective_Meeting_Agenda">http://www.neighborhoodlink.com/article/Association/Effective_Meeting_Agenda</a></p> <p><b>Doodle to aid in scheduling meetings:</b>  <a href="http://doodle.com/">http://doodle.com/</a></p> <p><b>Canva to create visuals:</b>  <a href="https://www.canva.com/">https://www.canva.com/</a></p> <p><b>MAVA- Metrolina Area Volunteer Administrators offers workshops on volunteer recruitment:</b>  <a href="https://facebook.com/MAVA-Metrolina-Association-for-Volunteer-Administrators-212961772174019/">facebook.com/MAVA-Metrolina-Association-for-Volunteer-Administrators-212961772174019/</a></p>
	<ul style="list-style-type: none"> <li>Invite a speaker</li> </ul>	<p><b>Choose what topic you want to address and invite a speaker: Need a Speaker:</b>  <a href="http://charmeck.org/speakersbureau/Pages/default.aspx">http://charmeck.org/speakersbureau/Pages/default.aspx</a>, or call 311</p>
<p><b>Replacement Project #1</b></p> <p>Maintain neighborhood trees through annual tree banding by neighborhood volunteers and matching grant, and pruning of street trees in conjunction with City Tree Management</p>	<ul style="list-style-type: none"> <li>Collect volunteer pledges and apply for tree banding matching grant</li> <li>Contact Engineering and Property Management to inquire about street tree pruning</li> </ul>	<p><b>Neighborhood Matching Grants (NMG) (Including Tree Banding Grants):</b>            Charlotte's NMG Program can provide grants to eligible neighborhood organizations for community improvement projects. To determine eligibility or to review program details please visit <a href="http://charlottenc.gov/nmg">http://charlottenc.gov/nmg</a> or call 704-336-3380.</p> <p><b>City Tree Management:</b>  <a href="http://charmeck.org/city/charlotte/epm/Services/Landscaping/Pages/Tree%20Management.aspx">http://charmeck.org/city/charlotte/epm/Services/Landscaping/Pages/Tree%20Management.aspx</a>            704-336-4262</p> <p><i>See resources for original project #1 (aside from Adopt-A-Stream information)</i></p>
<p><b>Project #2</b></p> <p>Redesign entrance (explore and identify</p>		<p><b>Neighborhood Matching Grants (NMG):</b>            Charlotte's NMG Program can provide grants to eligible neighborhood organizations for community improvement projects. To determine eligibility or to review program details please visit <a href="http://charlottenc.gov/nmg">http://charlottenc.gov/nmg</a> or call 704-336-3380.</p> <p><b>SouthWood Identifying our Community Grant Program:</b>  <a href="http://www.southwoodcorp.com/">http://www.southwoodcorp.com/</a></p>



<p>entrance area enhancements)  , plan how it will look, and apply for a Neighborhood Matching Grant</p>		<p><b>How-to lessons at Lowe's:</b>  <a href="http://www.lowes.com/cd_How+To+Library">http://www.lowes.com/cd_How+To+Library</a>  <b>Master Gardeners of Mecklenburg County:</b>  <a href="http://www.mastergardenersmecklenburg.org/">http://www.mastergardenersmecklenburg.org/</a>  <b>Home Depot Workshops:</b>  <a href="http://workshops.homedepot.com/workshops/home?cm_mmc=SEM THD G BT2 Resources&amp;gclid=CJi3x9XeuMACFQ1p4AodDx0AmQ&amp;gclsrc=ds">http://workshops.homedepot.com/workshops/home?cm_mmc=SEM THD G BT2 Resources&amp;gclid=CJi3x9XeuMACFQ1p4AodDx0AmQ&amp;gclsrc=ds</a>  <b>ToolBank is a great place to borrow tools for projects:</b>  <a href="http://charlotte.toolbank.org/">http://charlotte.toolbank.org/</a>  <b>Use NextDoor to discover neighbors who might be able to volunteer, donate materials, create a landscape design, and more.</b> <a href="https://www.youtube.com/watch?v=9V1tlhGjSMc;">https://www.youtube.com/watch?v=9V1tlhGjSMc;</a>  <a href="https://nextdoor.com/about_us/">https://nextdoor.com/about_us/</a>  <b>TreesCharlotte for education and tree planting:</b>  <a href="http://treescharlotte.org/">http://treescharlotte.org/</a>  <b>Useful Notes:</b>  - Signage on City/County owned property and/or within the public ROW requires a CDOT Decorative Signage Agreement or Encroachment Agreement  - Projects on private property require written permission from the property owner  - For approval to place signage in Public ROW contact Chip Gallup, <a href="mailto:rgallup@charlottenc.gov">rgallup@charlottenc.gov</a> or 704.336.3922</p>
<p><b>Project #3</b>  Update the website with info on activities, amenities that are nearby, HOA fees, basic info on number of homes lot size, schools, etc. with links</p>		<p><b>Digital Charlotte:</b>  <a href="http://digitalcharlotte.org/">http://digitalcharlotte.org/</a>  <b>Digital Resources:</b>  See attached flyer  <b>Additional neighborhood website example:</b>  <a href="http://www.elizabethcommunity.com/">http://www.elizabethcommunity.com/</a></p>

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

Charlenea Duncan, Community Engagement Specialist	John Short, Community Engagement Lead
<a href="mailto:csduncan@charlottenc.gov">csduncan@charlottenc.gov</a> or 704-336-2173	<a href="mailto:jshort@charlottenc.gov">jshort@charlottenc.gov</a> or 704-336-3862

