



NEIGHBORHOOD BOARD RETREAT



September 15, 2020

Plaza Shamrock Neighborhood Association

Hosted online by City of Charlotte Housing & Neighborhood Services

Plaza Shamrock Neighborhood Association

2020 Board Retreat

Background

On Tuesday, September 15, 2020, the board members of the Plaza Shamrock Neighborhood Association participated in the virtual Neighborhood Board Retreat facilitated by the City of Charlotte online. The following board members and/or community members participated in the retreat:

- Stephanie Phelps
- Shane Capps
- Caleb Van Voorhis
- Ryan Carter
- Emily Keane
- Julia Martin
- Stephanie Bercht

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 a copy of the Developing Your Ideas worksheet with our NMG request. This credit will expire following the March 1, 2022 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
- Seeing the Forest through the Trees: Developing Strategic Priorities
- 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 group discussion 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

Our discussion helped us to find 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?
<p>Best</p> <ul style="list-style-type: none"> • Neighborhood sign toppers • Full Board of Directors • A social media presence that highlights best of the neighborhood • Neighborhood vibe • Good relationships among neighbors • Opportunities to connect with neighbors <p>Worst</p> <ul style="list-style-type: none"> • Lack of name recognition • MLS neighborhood name discrepancy • There was a point in time where the Board was not operating the HOA according to the bylaws • Lack of representation on the Board • Tension • Poor meeting attendance 	<p>Would</p> <ul style="list-style-type: none"> • Affordability • Proximity to areas that offer social experiences • Quite • Minimum traffic • Sidewalks • Neighborhood pride <p>Would not</p> <ul style="list-style-type: none"> • Neighborhood lacks shops, attractions, parks etc. that would draw people to the neighborhood • Lacks connectivity • Not pedestrian friendly • Safety concerns at local nightclub 	<p>Wishes</p> <ul style="list-style-type: none"> • Amenities to draw people to the neighborhood • A community space • Stronger neighborhood identity • A more diverse representative Board of Directors

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. This activity led us to the following categories and action items being identified as important within our community:

- **Board Development**
 - Obtain a full and diverse board
 - Better understand roles and responsibilities of neighborhood association
 - Increase awareness of PSNA (membership, dues, activities)

- **Neighborhood Improvement**
 - Develop a common space for neighborhood gatherings
 - Improve pedestrian safety
 - Construct stone sign identifying neighborhood

- **Community Engagement**
 - Increase PSNA membership
 - Create welcome kit
 - Have community conversations to increase diversity, equity, and inclusion in neighborhood conversations/decisions

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.

2020 Neighborhood Board Retreat Summary

Plaza Shamrock Neighborhood Association

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



IN 2020-2021, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:



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.

Project	Potential Resource Categories of Interest
Increase PSNA membership by 50% by the end of December 2021.	Community Engagement
Research available land to develop into common space for the neighborhood by March 2021.	Neighborhood Improvement
By March 2021, identify locations for possible community gardens and agree which ones to apply for NMG funding for.	Community Engagement

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

Charlenea Duncan, Northeast Community Engagement Manager
csduncan@charlottenc.gov or 704-336-2173