



**CHARLOTTE™**

# **2015 NEIGHBORHOOD BOARD RETREAT**



**Sardis Cove Home Owners Association**

Hosted by City of Charlotte Neighborhood & Business Services at CPCC Main Campus



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>• Good – Feel of neighborhood, residents were more engaged.</li> <li>• Worst – Undisciplined board, the management company, strained relationship with BOD and residents, Board was self-serving.</li> </ul>	<p>BOD has more positive presence with residents, BOD corrected bad policies.</p> <p>Property value is attractive to seniors</p> <p>Lack of amenities, club house, park benches, common areas.</p> <p>Lack of communications and old marketing material.</p> <p>Older demographic.</p>	<ul style="list-style-type: none"> <li>• Neighborhood directory</li> <li>• Upgrade roofs, mailboxes, kiosks etc.</li> <li>• More human resources and committees to get work done.</li> <li>• Outreach to larger/broader community (outside Sardis Cove)</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:

Sardis Cove is a close knit neighborhood that fosters open communication and willingness to get involved with and help others within and outside our 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:

- Board Development
- Sardis Cove Communication
- Financing Improvements and Grant Projects

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 2014-2015

The three activities selected as most impactful toward achieving our strategic priorities are activities in 2014-2015 are:



## 2015 Neighborhood Board Retreat Summary

### Sardis Cove Community

#### Vision:

Sardis Cove is a close knit neighborhood that fosters open communication and willingness to get involved with and help others within and outside our community.

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

1

Board Development

2

Sardis Cove  
Communication

3

Financing  
Improvements and  
Grant Projects

#### IN 2014-2015, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Board Retreat

Develop info sheet,  
newsletter, and  
create directory.

Meet with NBS,  
complete grant project  
paperwork and  
submission forms.

## Resources to Get Started

Project	Getting Started	Resources
<p><b>Project #1 Board Retreat</b></p>	<ul style="list-style-type: none"> <li>Get additional resources to develop your board</li> </ul>	<p><b>Recruiting potential board members</b>  <a href="http://www.hoaleader.com/public/351.cfm">http://www.hoaleader.com/public/351.cfm</a></p> <p><b>Increase neighborhood participation:</b>  <a href="http://atlantahoamanagement.wordpress.com/2011/09/27/how-to-increase-attendance-or-participation-in-homeowner-committees/">http://atlantahoamanagement.wordpress.com/2011/09/27/how-to-increase-attendance-or-participation-in-homeowner-committees/</a></p> <hr/> <p><b>Board development online resources:</b>  <a href="https://boardsource.org/eweb/">BoardSource https://boardsource.org/eweb/</a></p> <p><b>How to organize committees:</b>  <a href="http://www.mycommittee.com/BestPractice/Committees/Startingacommittee/tabid/244/Default.aspx">http://www.mycommittee.com/BestPractice/Committees/Startingacommittee/tabid/244/Default.aspx</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>Organizational Goal Setting</b>  <a href="http://www.flexstudy.com/catalog/schpdf.cfm?coursenum=95086">http://www.flexstudy.com/catalog/schpdf.cfm?coursenum=95086</a></p>
<p><b>Project #2 Develop information sheet, newsletter and create directory</b></p>	<ul style="list-style-type: none"> <li>Consider creating an electronic newsletter</li> <li>Create a NextDoor account</li> </ul>	<p><b>Mail Chimp:</b>            Free online newsletter creator to announce events  <a href="http://www.mailchimp.com">www.mailchimp.com</a></p> <p><b>Nextdoor:</b>            Create a private social network for your neighborhood  <a href="https://nextdoor.com/about_us/">https://nextdoor.com/about_us/</a></p>
<p><b>Project #3 Meet with NBS to complete grant project paperwork and submission forms</b></p>	<ul style="list-style-type: none"> <li>Meet with Atalie Zimmerman to learn more about Neighborhood Matching Grants</li> </ul>	<p><b>Neighborhood Matching Grants</b>  <a href="http://charmeck.org/city/charlotte/nbs/communityengagement/nmg/Pages/default.aspx?NotFoundURL=http://charmeck.org/city/charlotte/nbs/communitycommerce/Pages/NMG.aspx&amp;Referer=">http://charmeck.org/city/charlotte/nbs/communityengagement/nmg/Pages/default.aspx?NotFoundURL=http://charmeck.org/city/charlotte/nbs/communitycommerce/Pages/NMG.aspx&amp;Referer=</a></p> <p>Contact: Atalie Zimmerman, 704-336-4594, <a href="mailto:azimmerman@charlottenc.gov">azimmerman@charlottenc.gov</a></p>

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