



**CHARLOTTE**<sup>SM</sup>

# **NEIGHBORHOOD BOARD RETREAT**



**July 13, 2019**

**Sherbrook HOA**

**Hosted by City of Charlotte Housing & Neighborhood Services at**

**Goodwill Opportunity Campus**

# Sherbrook HOA

## 2019 Board Retreat

### Background

On Saturday, July 13, 2019, the board members of the Sherbrook HOA participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at the Goodwill Opportunity Campus. The following board members and/or community members participated in the retreat:

Terry Rice  
Darryl Yokley

Melissa McGhee  
Victoria Combs



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, 2020 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>• High Crime</li> <li>• Low Community Engagement</li> <li>• Low HOA Revenue</li> <li>• Split Community 35 homes in neighborhood not included in HOA by developer</li> <li>• Downturn of homeowners to renters</li> <li>• CFD trucks cannot get down the street due to parked cars on the streets.</li> </ul>	<ul style="list-style-type: none"> <li>• Split Community</li> <li>• In transition to lower crime</li> <li>• Businesses do not have any incentives to develop the area therefore no development is happening. Development declined when the Mall closed.</li> </ul>	<ul style="list-style-type: none"> <li>• Lower Crime &amp; Safety Hire CMPD to patrol community June to August</li> <li>• Inclusion &amp; Forward Thinking all around</li> <li>• Increase Capital</li> <li>• Improve on amenities</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:

*Sherbrook is an inclusive welcoming community that values safety and the natural beauty of our neighborhood.*

## 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:

- Increase Community Safety
  - Install additional lighting
- Increase Capital
  - Hold Neighborhood Fundraisers
  - Solicitation of more owners into the association
- Inclusiveness
  - Solicit Bilingual help

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.



2019 Neighborhood Board Retreat Summary

Sherbrook HOA

OUR VISION:

*Sherbrook is an inclusive welcoming community that values safety and the natural beauty of our neighborhood.*

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

1

Increase Community Safety

2

Increase Capital

3

Inclusiveness

IN 2019-2020, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:

Install additional security lighting by August 2020.

Hold a neighborhood fundraiser by August 2020.

Solicit bilingual help and translate neighborhood welcome letter into a foreign language by August 2020.

**Please list any parking lot items or additional activities beyond the initial 3 here.**

Upgrade Neighborhood Sign

Learn more about Decorative Signs here:

[https://charlottenc.gov/civinnovation/Placemaking\\_Program/placemaking/Documents/DecorativeSignage.pdf](https://charlottenc.gov/civinnovation/Placemaking_Program/placemaking/Documents/DecorativeSignage.pdf)

How to annex the 35 homes in the neighborhood to be included in the HOA

Community Associations Institute might have helpful information: <https://www.caionline.org/pages/default.aspx>

Hire CMPD during out of school months of June to August

Apply to hire an off-duty CMPD officer here: [https://charlottenc.seamlessdocs.com/w/2ndaryEmploy\\_Agreement](https://charlottenc.seamlessdocs.com/w/2ndaryEmploy_Agreement)

Create flyers to show benefits of joining the HOA

Canva has helpful resources for branding: <https://www.canva.com/learn/branding/>

**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
<b>Install additional security lighting by August 2020.</b>	Beautification; Public Safety
<b>Hold a neighborhood fundraiser by August 2020.</b>	Board Development; Welcoming & Engaging Neighbors
<b>Solicit bilingual help and translate neighborhood welcome letter into a foreign language by August 2020.</b>	Welcoming & Engaging Neighbors

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

Charlenea Duncan, Northeast Community Engagement Liaison	John Short, Northeast Community Engagement Manager
<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

