



March 12, 2022

Sherbrook Homeowners Association

Sherbrook Homeowners Association

2022 Board Retreat

Background

On Saturday, March 12, 2022, members of the Sherbrook Homeowners Association participated in the virtual Neighborhood Board Retreat facilitated by the City of Charlotte. The following board members and/or community members participated in the retreat:

- Terri Rice-Abercrombie, President
- Mandy O’Rear, Vice President
- Cindy Karns, Secretary
- Janice Thompson, Member at At-Large

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
- Outline a direction for the future of the neighborhood that represents the needs and desires of current and future residents
- Set clear goals and priorities for the upcoming year(s)

By participating in the retreat, our board earned a credit of up to \$1,500 toward volunteer hours required for the 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 June 1, 2023, 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:

- Analyzing neighborhood trends and conditions
- Developing strategic priorities
- Developing project ideas

The agenda for the day was as follows:

- Introductions
- Icebreaker

- Understanding your neighborhood - SWOT Analysis
- Developing Strategic Priorities
- Creating SMART Goals
- Idea Development – Time for participants for develop an action plan for goal achievement

SWOT Analysis

We began our day with group discussion using the SWOT Analysis framework. 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.

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Good communication • Welcoming neighborhood • Small community • Strong Leadership • Partnerships are an asset • Applied for grants • Sense of community • Quiet and safe community • Friendly 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Strengthen engagement • HOA dues without amenities • More activities to get residence involved • Vulnerable, homes are being brought and rented out
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Involved in local schools and churches • Youth engagement • Give back to the community; backpack give-a-ways • New amenities (walking trails, gathering spaces; dog park • Recreational facilities 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Buy-in from residents/neighbors • Rental properties; not taken care of; no respect for property • Economic conditions • Property bought by investment companies • Adding greenways attracts potential crime

Strategic Priorities

After completing the SWOT analysis, participants began to brainstorm 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 priorities/action items being identified as important within our community:

- Resident engagement
- Creating partnerships
- Amenities (storage space and greenways)
- Beautification

The three priorities 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.

2022 Neighborhood Board Retreat Summary

Sherbrook Homeowners Association

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



IN 2022-2023, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:



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
Board will develop a calendar to do 5 social events by September 2022	Community Engagement
Board will identify and contract at least two local partnerships, including churches and schools by March 2023	Partnerships
Board will have land surveyed for storage facility and aesthetics by June 2022	Neighborhood Improvement
Bonus goal: Planting flowers around entry sign and other areas. Community will beautify entrance and street signs and electronical boxes by March 2023	Beautification

Your community is located within Charlotte's Southeast. Your staff contact for following up and community assistance is:

Kim Barnes, Southeast Community Engagement Manager

kim.barnes@charlottenc.gov