



NEIGHBORHOOD BOARD RETREAT



March 13, 2021

Sherbrook HOA of Mecklenburg County

Hosted online by City of Charlotte Housing & Neighborhood Services

Sherbrook HOA of Mecklenburg County

2021 Board Retreat

Background

On Saturday, March 13, 2021, members of Sherbrook HOA of Mecklenburg County 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:

- Terri Rice-Abercrombie
- Darryl Yokley
- Alecia Williams
- Mary Jackson

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 June 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"> • More people moving in • Natural beauty, many trees • Affordability • Young population, kids • Small community, still being built <p>Worst</p> <ul style="list-style-type: none"> • Less diverse, quick turnover rate • Not much engagement, no progress in community • Neighbors kept to themselves • Crime • Lack of community events 	<p>Would</p> <ul style="list-style-type: none"> • Upside of community transition • Tangible improvements, NMGs • Engaging with more neighbors • Great place to live, grow up • Building back the neighborhood <p>Would not</p> <ul style="list-style-type: none"> • Lack of first-time home buyers • Corporate rental properties, limited availability • Increase in police presence • Lack of unity • No walking trails/litter problems 	<p>Wishes</p> <ul style="list-style-type: none"> • Moving forward, not backwards • New generation of neighbors stepping up and showing leadership • Mentoring youth, keeping them in the community • Continuing to diversify the neighborhood • Transitioning board over to change-making neighbors

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 priorities/action items being identified as important within our community:

- Welcoming new neighbors to the community
- Follow-up and keep in touch with current neighbors, offer help when needed
- Develop community outreach program, increase engagement
- Preserve and protect 8+ acres of community's natural area
- Develop leadership among neighbors, offer mentorship
- Host a community block party/other community events
- Potential for Little Free Pantry in community
- Update CCR progress
- Apply for more NMGs to improve the community
- Have more amenities in the area (food desert, lack of trails, etc.)

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.

2021 Neighborhood Board Retreat Summary

Sherbrook HOA of Mecklenburg County

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

1

Make effort to welcome new neighbors and engage with the overall community.

2

Protect and preserve the 8+ acres of wooded, natural area in the community.

3

Develop leadership/mentorship program for the board.

IN 2021-2022, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Use NMG funds to stock up on supplies for new resident welcome baskets by March 2022.

Survey property lines and have a tree canopy assessment with City Arborist by March 2022.

Create a committee or position centered around the interests of neighbors (i.e. event planning, social clubs, sports, etc.)

Goal Category	Goals
Welcoming & Engaging Neighborhoods	<p>Goal 1: Make effort to welcome new neighbors and engage with the overall community.</p> <ul style="list-style-type: none"> - Use NMG funds to stock up on supplies for new resident welcome baskets by March 2022. - Create cards with contact information and upcoming neighborhood events. - Develop new community-wide event by Jan. 2022. - Develop relationships with property management companies of 8+ rental properties, as well as tenants.
Beautification/ Environment	<p>Goal 2: Protect and preserve the 8+ acres of wooded, natural area in the community.</p> <ul style="list-style-type: none"> - Phase 1: Survey property lines and have a tree canopy assessment with City Arborist by March 2022. - Apply for a Tree Care Grant or Beautification Grant to trim back and maintain trees. - Phase 2: Create clear boundaries of preserved areas as well as a plaque/signage recognizing the area by June 2022.

Board Development	<p>Goal 3: Develop leadership/mentorship program for the board.</p> <ul style="list-style-type: none"> - Create a committee or position centered around the interests of neighbors (i.e. event planning, social clubs, sports, etc.) - Engage with neighbors to recruit stronger, change-making board members. - Expose neighbors to the functions of the board, hold open meetings and invite neighbors to attend. - Develop a yard/house of the month recognition program to help neighbors feel included by September 2021.
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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	Categories of Interest/Potential Resource
Use NMG funds to stock up on supplies for new resident welcome baskets by March 2022.	Welcoming & Engaging Neighborhoods
Survey property lines and have a tree canopy assessment with City Arborist by March 2022.	Beautification/Environment
Create a committee or position centered around the interests of neighbors (i.e. event planning, social clubs, sports, etc.)	Board Development

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

Faith Estrada, Service area Community Engagement Liaison	Kim Barnes, Service Area Community Engagement Manager
Faith.estrada@charlottenc.gov or 704-353-1879	Kim.Barnes@charlottenc.gov or 704-336-8408