



# **NEIGHBORHOOD BOARD RETREAT**



**February 08, 2020**

**Southbridge Forest HOA**

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

**Goodwill Opportunity Campus**

## Southbridge Forest HOA 2020 Board Retreat

### Background

On Saturday, February 08, 2020, the board members of the Southbridge Forest 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:

• Kacey Weis	• Thomas Lomas
• Allison Moore	• Steven Fix
• Tina Fix	

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 worksheets from the Neighborhood Board Retreat Participant Workbook (pages 14 – 17) with our NMG request. This credit will expire following the June 1, 2021 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?
<p>Best:</p> <ul style="list-style-type: none"> <li>• Families with kids</li> <li>• Quiet</li> <li>• Small</li> <li>• No speed bumps</li> <li>• More owner occupied</li> <li>• Curb appeal</li> </ul> <p>Worst:</p> <ul style="list-style-type: none"> <li>• Builders buying adjacent lands- cause erosion, traffic, flooding               <ul style="list-style-type: none"> <li>• Crime, thefts</li> </ul> </li> </ul>	<p>Why:</p> <ul style="list-style-type: none"> <li>• Low Crime</li> <li>• Quiet</li> <li>• Park, Common Areas</li> <li>• Low HOA dues</li> <li>• Great Location</li> <li>• Great Price Point</li> <li>• Good Schools</li> </ul> <p>Why not:</p> <ul style="list-style-type: none"> <li>• Additional rentals</li> <li>• Rental upkeep is poor</li> <li>• Construction at adjacent properties               <ul style="list-style-type: none"> <li>• Lower curb appeal and pride</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Reduce rentals</li> <li>• More community involvement</li> <li>• Updates to common areas</li> <li>• Instill pride</li> <li>• Safe</li> <li>• Quaint</li> <li>• Better HOA Management Company</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:** *Southbridge Forest is an established, quaint community where families feel safe and engaged to build a prideful 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:

Fill in the categories (large Post-Its) and associated ideas/action items, adding and deleting bullet points as necessary.

- Category 1 Events and Activities
  - Utilize Community Board
  - Distribute Newsletters
- Category 2 Improve Common Area
  - Apply for NMG
  - Apply for Placemaking Grant
  - Contact Charlotte Green about a Community Garden
  - Use Toolbank for Property Improvements

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 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.



**2020 Neighborhood Board Retreat Summary**

**Southbridge Forest HOA**

**OUR VISION:** *Southbridge Forest is an established, quaint community where families feel safe and engaged to build a prideful neighborhood.*

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

1

Neighborhood  
Improvement

2

Beautification

3

Community  
Engagement

**IN 2020-2021, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:**

Apply for a  
Neighborhood  
Matching Grant by  
March 2020 to improve  
common area

Is this goal SMART? Yes

Partner with Charlotte  
Green to start a  
community garden by  
the spring 2021

Is this goal SMART? Yes

Organize a social event or  
volunteer opportunity by  
December 2020

Is this goal SMART? Yes

**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>Apply for a Neighborhood Matching Grant by March 2020 to improve the common area</b>	Neighborhood Improvement
<b>Partner with Charlotte Green to start a community garden by spring 2021</b>	Beautification/Neighborhood Improvement
<b>Organize a social event or volunteer opportunity by December 2020</b>	Community Engagement

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

Chad Martin, Southwest Community Engagement Liaison	Millicent Powell, Southwest Community Engagement Manager
<a href="mailto:chad.martin@charlottenc.gov">chad.martin@charlottenc.gov</a> or 704-432-1579	<a href="mailto:mpowell@charlottenc.gov">mpowell@charlottenc.gov</a> or 704-432-6814

