February 23, 2019

The Reserve at Back Creek HOA

Hosted by City of Charlotte Housing & Neighborhood Services at Goodwill Opportunity Campus
Background

On Saturday, February 23, 2019, the board members of The Reserve at Back Creek 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:

- Regina Solomon
- Jim Katon
- Justin Kerner
- Sheron Williams

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 March 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.

<table>
<thead>
<tr>
<th>Where We Were: Reflecting on our past, what were some of the best/worst moments?</th>
<th>Where We Are: Why would or wouldn’t a person/business want to move into our community?</th>
<th>Where We Want to Be: If you could make 3 wishes to make our community flourish, what would they be?</th>
</tr>
</thead>
</table>
| **Best Moments**
- Forming an HOA
- Block Party
- Getting to know neighbors
- Block party preparation
- Friendships created
| **Reasons to move into community**
- Quiet neighborhood
- Nice property
- Nice Homes
- Price
| **Maximize NMG**
| **Reasons Not to move into neighborhood**
- No amenities
- Can’t walk to other places
- Backyard space
| **Create a nice neighborhood entrance**
| | **Install speed humps**
| | **Tax issue resolved**
| | **Resolve delivery issues**
| | **More lights**
| | **Create more holiday spirit**
| | **Community togetherness**
| | **Amenities**
| **Worst Moments**
- Developer pulled out of neighborhood – bad opinion of HOA resulted
- Neighbors do not know each other
- Negative interaction with neighbors: unable to communicate without a 3rd party
- Lack of interest to serve on HOA Board
|
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:**

To cultivate growth and development within our community, promote neighborly relationships among residents, and enjoy the highest level of community living with a beautiful, well-maintained, safe environment.

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:

- **Category 1 Road Safety**
  - Speed Humps
- **Category 2 Neighborhood Entrance**
  - Landscaping lights
  - Irrigation system
- **Category 3 Social**
  - Create Committee
  - Block Party
  - More volunteers
- **Category 4 Governance**
  - Identify at-large board members
  - Better attendance at planning meetings
  - More active board members
  - Get rid of vacant lots
- **Category 5 Communication**
  - Establish a committee
  - Create an email distribution list

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

## The Reserve at Back Creek HOA

### OUR VISION:

*To cultivate growth and development within our community, promote neighborly relationships among residents, and enjoy the highest level of community living with a beautiful, well-maintained, safe environment.*

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

<table>
<thead>
<tr>
<th>#</th>
<th>Safety</th>
<th>Neighborhood Beautification</th>
<th>Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identified point person: Regina and Aminta</td>
<td></td>
<td>Identified point people: Sheron and Shanise</td>
</tr>
</tbody>
</table>

### IN 2019-2020, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

1. **Safety**
   - Work with CMPD Community Officers Chad Webster and Jason Peetz to identify resources that will address neighborhood speeding.

2. **Neighborhood Beautification**
   - By March 2020, research landscapers to determine if current company is providing the best service for enhancing neighborhood entrance.

3. **Communications**
   - By March 2020, identify an individual with skill set to create a neighborhood email group account.
Please list any parking lot items or additional activities beyond the initial 3 here.

- Would like to know about other small neighborhoods in Charlotte – do they have HOAs? What are some best practices they use?
- They would like some guidance on putting together and sustaining an HOA.
  - *Housing & Neighborhood Services is working to develop a training on HOA best practices. Once the workshop is planned and scheduled, it will be advertised here: [https://charlottenc.gov/HNS/CE/CommunityInfo/Pages/NeighborhoodTrainingPrograms.aspx](https://charlottenc.gov/HNS/CE/CommunityInfo/Pages/NeighborhoodTrainingPrograms.aspx)*
- Could the Quality of Life Data address only the streets in their neighborhood and not the entire NPA?
  - *The Neighborhood Profile Area (NPA) is as far as we can drill down using the Quality of Life Explorer ([https://mcmap.org/qol/](https://mcmap.org/qol/)); Charlotte Explorer might be helpful ([vc.charmeck.org/Prerelease](vc.charmeck.org/Prerelease))*
- Officer Ryan Botzenmayer shared his contact information – 704-534-6731 rbotzenmayer@cmpd.org

**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](https://charlottenc.gov/HNS/CE/CommunityInfo/Pages/NeighborhoodTrainingPrograms.aspx). 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.

<table>
<thead>
<tr>
<th>Project</th>
<th>Potential Resource Categories of Interest</th>
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<tbody>
<tr>
<td><strong>Work with CMPD Community Officers Chad Webster and Jason Peetz to identify resources that will address neighborhood speeding.</strong></td>
<td>Public Safety</td>
</tr>
<tr>
<td><strong>By March 2020, research landscapers to determine if current company is providing the best service for enhancing neighborhood entrance.</strong></td>
<td>Partnerships</td>
</tr>
<tr>
<td><strong>By March 2020, identify an individual with skill set to create a neighborhood email group account.</strong></td>
<td>Communication</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Charlenea Duncan, Northeast Community Engagement Liaison</th>
<th>John Short, Northeast Community Engagement Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:csduncan@charlottenc.gov">csduncan@charlottenc.gov</a> or 704-336-2173</td>
<td><a href="mailto:jshort@charlottenc.gov">jshort@charlottenc.gov</a> or 704-336-3862</td>
</tr>
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