



CHARLOTTE.

2016 NEIGHBORHOOD BOARD RETREAT



Timberlands HOA

Hosted by City of Charlotte Neighborhood & Business Services at UNC Charlotte Center City

Timberlands HOA

2016 Board Retreat

Background

On Saturday, July 16th, 2016, the board members of the Timberlands HOA participated in the Neighborhood Board Retreat facilitated by the City of Charlotte, hosted at UNC Charlotte Center City. The following board members participated in the retreat:

- Senilla Patterson
- Marilyn Phroneberger
- Sonya Hawkins
- Pat Brown
- Deneen Price



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, 2017 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.

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?
<ul style="list-style-type: none"> • Had activities for our children • Lack of awareness about by-laws/lack of neighbor involvement • Had a neighborhood newsletter • Imbalance of power between HOA and management company • Aggressive fining and penalties • Lack of neighborhood Board meetings 	<ul style="list-style-type: none"> • Low crime • Great deal of traffic congestion – use of community as a short cut • Convenient location • Need to regain trust of community – issue because of past Board and management company abuse of power • There is an openness to change • Focus on welcoming • Common areas are too bland 	<ul style="list-style-type: none"> • Turn common areas into family areas • Work together as a community – ownership • Ease traffic congestion • More involvement in zoning process for new development • Residents take more pride in their properties • Bring property values up – less renters • More inclusiveness • Transparency in Board's work • Sense of community • More control by residents in community management

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:

Timberlands is a community-oriented, welcoming neighborhood that maintains its unique and natural beauty.

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:

Management Company Reform

- Hire new management company

Neighborhood/Resident Activities

- Yearly yard sales
- Garage sale
- Getting to know neighbors
- Block party
- Possibly start a walking group
- Welcome baskets for new residents
- Common areas used for family programming
- Start a neighborhood watch
- Movie nights

Address Traffic Congestion

- Traffic control for short cut issues

City Services

- Cleaning Streets and sidewalks
- Code, Zoning and Planning

Physical Neighborhood Improvements

- Natural beauty, cool water streams, green trees
- Beautify entry into community
- Make common area community friendly
- Revitalize common areas
- Better landscape
- Better lighting
- Speed bumps
- Picnic tables with gazebo or portico for neighbor to gather

Effective, Inclusive Communication

- Communicate and keep an open dialog with residents
- Daily communications with neighbors
- Monthly newsletter

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, these are:



Action Items for 2016-2017 The three activities selected as most impactful toward achieving our strategic priorities are activities in 2016-2017 are:



2016 Neighborhood Board Retreat Summary

Timberlands HOA

OUR VISION:

Timberlands is a community-oriented, welcoming neighborhood that maintains its unique and natural beauty.

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

1

Engage in management reform

2

Increase communications and keep open dialog

3

Address traffic congestion

IN 2016-2017, WE WILL WORK ON THESE ACTIVITIES GUIDED BY OUR PRIORITIES:

Contract with new management company that meets Timberlands' needs
(Estimated Completion: January 1, 2017)

Create and execute a community-driven communications strategy
(Estimated Completion: August 31, 2017)

Increase participation in the zoning and traffic planning process
(Estimated Completion: May 1, 2017)

Please list any parking lot issues or items here:

1. Timberlands HOA Board would like someone to follow up with them about crime statistics. They would like to know if their crime statistics are low, average and high in comparison to other Charlotte neighborhoods. ***Service Area staff will follow up with you on this matter.***
2. Timberlands HOA Board requests someone follow up with them to further explain the Neighborhood Matching Grants criteria. They are questioning the tax value being used for their neighborhood as they feel their tax values are low enough to qualify. ***Neighborhood and Business Services Staff will contact Deneen Price to review this information.***



Resources to Get Started- You've rolled up your sleeves and established your vision. The resources that follow may assist your organization in achieving your goals. Links and contact information are provided for information only and are subject to change. (Resources and next steps you determined during your Board Retreat have been included in the "Getting Started" column.)



Project	Getting Started	Resources
<p>Project #1</p> <p>Contract with new management company that meets Timberlands' needs</p>	<ul style="list-style-type: none"> Better Business Bureau References from other HOA Boards Google best practices for management company and HOA relationship 	<p>Board development online resources: BoardSource: https://boardsource.org/eweb/ Management Directory (starting point): http://hoamanagementdirectory.com/ Use a survey to see what qualities neighbors would like to see in a management company: Online survey tool: www.surveymonkey.com</p>
<p>Project #2</p> <p>Create and execute a community-driven communications strategy</p>	<ul style="list-style-type: none"> Research community engagement templates – Community Engagement assistance Survey neighbors Other HOA recommendations Participation incentives Funding resources from non-profit organizations 	<p>Service Area staff can be of assistance (see below) Online survey tool: www.surveymonkey.com Types of neighborhood communication: http://www.neighborhoodlink.com/article/Association/Effective_HOA_Communication Additional examples of communication: http://mrsc.org/Home/Explore-Topics/Governance/Citizen-Participation-and-Engagement/Communication-and-Citizen-Participation-Techniques.aspx Nextdoor: Create a private social network for your neighborhood: https://nextdoor.com/about_us/ Local Resources for Neighborhoods: http://digitalcharlotte.org/ Knight School of Communication at Queens University (copy and paste entire URL into browser if hyperlink does not work): http://www.queens.edu/Academics-and-Schools/Schools-and-Colleges/Knight-School-of-Communication/Spotlight-Stories/How-Do-Neighborhoods-Communicate.html</p>
<p>Project #3</p> <p>Increase participation in the zoning and traffic planning process</p>	<ul style="list-style-type: none"> Charlotte-Mecklenburg Planning Website Understand road ownership (CDOT, NCDOT) Charlotte Area Transit System CMPD Ask Community Engagement to assist with City department connections 	<p>Charlotte-Mecklenburg Planning Department: http://charmeck.org/city/charlotte/planning/Pages/Home.aspx Charlotte Department of Transportation http://charmeck.org/city/charlotte/Transportation/Pages/Home.aspx City vs. State-Maintained Streets http://vc.charmeck.org/ (select options under "Transportation") Charlotte Area Transit System http://ridetransit.org CMPD www.cmpd.org</p> <p>Service Area staff to provide connections (see below)</p>

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

Charlenea Duncan, Community Engagement Specialist	John Short, Community Engagement Lead
csduncan@charlottenc.gov or 704-336-2173	jshort@charlottenc.gov or 704-336-3862