



CHARLOTTE™

2015 NEIGHBORHOOD BOARD RETREAT



Woodcroft at Davis Lake

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

Woodcroft at Davis Lake

2015 Board Retreat

Background

On Saturday July 18, 2015, the board members of Woodcroft at Davis Lake participated in a board retreat facilitated by the City of Charlotte, hosted at UNC Charlotte Center City. The following board members participated in the retreat:

• Gail Brown - Secretary	• Prince Jones
• Ralph Peter – President	• Ann Randolph
• Jim Whitford – Vice President	



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 Neighborhood Matching Grant credit to help execute one of the projects we identified.

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?
<p>Best:</p> <ul style="list-style-type: none"> • Newsletter • Unique / Low-density community <p>Worst:</p> <ul style="list-style-type: none"> • Crime started to increase • Property upkeep decreased • Parking concerns • Davis Lake proper: dues/bad relationship • Low community involvement • Poor board management/accounting practices • Complaining neighbors 	<p>Why:</p> <ul style="list-style-type: none"> • Crime has decreased • Property upkeep improving • General maintenance improved • Security measures instituted • Police patrolling • Small, intimate community • Well maintained • Newcomers/ new ideas/ perspectives being embraced • Community: newsletter, quarterly meetings, well defined board roles <p>Why Not:</p> <ul style="list-style-type: none"> • Dues are unpredictable • Dues are high 	<ul style="list-style-type: none"> • Continue making improvements • Safe and desirable place to live • More transparent board • Continuing capital projects on buildings • Vibrant and growing community • Collaboration with other communities • Improved overall community communication • Better relationship with Davis Lake proper • More socially connected neighbors • Making use of other revenue sources for projects

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:

Woodcroft at Davis Lake is a uniquely intimate, safe, well-maintained and established townhome community, nestled by a welcoming landscape with a rich and diverse culture offering a compelling place to live.



What other stakeholders can add value to our vision?

Community, HOA, City, CMPD, Homeowners, Davis Lake proper

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:

- **Improve Communication**
- **Safety**
- **Beautification (community landscaping)**
- **General Maintenance**
- **Signage**

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:



All Potential Projects

The board then began to brainstorm on possible projects or activities that aligned with their strategic priorities

(based on our tree activity):

Strategic Priority	Potential Projects	Sources that could give life to success
<i>“The Trunk”</i>	<i>“The Fruit”</i>	<i>“The Roots”</i>
1. Beautification (Community landscaping)	<ul style="list-style-type: none"> • Landscaping • Common areas: plant mulch and shrubbery • Tree planting, pruning and removal • Erosion control • Replace siding 	<ul style="list-style-type: none"> • Fundraisers • Grants • Owners/ HOA • Trees Charlotte
2. Safety	<ul style="list-style-type: none"> • Expansion of fencing on apartment side of community • Establish better collaboration with apartment community 	<ul style="list-style-type: none"> • HOA • Homeowners • Apartment owners • CRC : Community Relations Committee • Police/ CPTED • Neighborhood watch

3. Improve Communication	<ul style="list-style-type: none"> • Better communication between board and community • Community involvement via committee signups • Quarterly workshops addressing needs (some led by homeowners) • Nation Night Out event for the community, including Davis Lake proper 	<ul style="list-style-type: none"> • Newsletter/flyer/e-mail blast • Davis Lake proper HOA • Queen’s College: Communication workshop • UNCC CHARP: Charlotte Action Research Project • Website • NextDoor
4. General Maintenance	<ul style="list-style-type: none"> • Continued property maintenance and improvement • Repave streets/ Street repair • Gutter guards 	<ul style="list-style-type: none"> • HOA • Homeowners • Grant opportunities
5. Signage	<ul style="list-style-type: none"> • Entrance redesign • Signage enhancements 	<ul style="list-style-type: none"> • HOA • Homeowners • Grant opportunities

Action Items for 2015-2016 The three activities selected as most impactful toward achieving our strategic priorities are activities in 2015-2016 are:



2015 Neighborhood Board Retreat Summary

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



IN 2015-2016, WE WILL WORK ON THESE ACTIVITES GUIDED BY OUR PRIORITES:



Resources to Get Started

Project	Getting Started	Resources
Project #1 Plant trees/shrubs and establish Natural Areas	<ul style="list-style-type: none"> Identify funding for project 	<p align="center">Neighborhood Matching Grants</p> Contact Atalie Zimmerman for more information: azimmerman@charlottenc.gov 704-336-4594 The Foundation for the Carolinas provides Front Porch Grants to build a sense of community in neighborhoods http://www.fftc.org/page.aspx?pid=663
Project # 2 Install a fence between the community and adjacent apartments	<ul style="list-style-type: none"> Develop/send out a survey for neighbors to secure placement of fencing ideas from the residents 	<p align="center">Online survey tool: www.surveymonkey.com</p> Sample neighborhood survey: http://www.santacruzneighbors.com/files/form_sampleneighborhoodsurvey.pdf
	<ul style="list-style-type: none"> Committee Development 	<p align="center">How to organize a committee:</p> http://www.mycommittee.com/BestPractice/Committees/Startingacommittee/tabid/244/Default.aspx
Project #3 Promote and encourage participation in National Night Out with Davis Lake Proper	<ul style="list-style-type: none"> Learn more about National Night Out Engage neighbors in community participation 	<p align="center">More information on National Night Out</p> https://natwo.org Increase neighborhood participation: http://atlantahoamanagement.wordpress.com/2011/09/27/how-to-increase-attendance-or-participation-in-homeowner-committees/ Increase Neighborhood Volunteers http://www.neighborhoodlink.com/article/Association/Attracting_Volunteers
<p>Parking Lot Items</p> <p>Collaboration with Davis Lake http://charmeck.org/city/charlotte/CRC/Pages/default.aspx</p> <p>Communication Workshop Queens College http://www.queens.edu/knightedwardsc@queens.edu</p> <p>UNCC Urban Institute https://ui.uncc.edu/</p> <p>Charlotte Mecklenburg Library Grant Workshops http://www.cmlibrary.org/Locations/nonprofitresource.asp</p>		

Your community is located within Charlotte’s North East Service Area, your staff contacts for following up and community assistance are:

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

