



Lee's Summit City Council Strategic Vision and Goals



LEE'S SUMMIT
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City Council Retreat Working Dates of
December 14 & 16, 2012 and March 21, 2013

Introduction

The Lee's Summit City Council Retreat, December 14 & 16, 2012 focused on providing the Council an opportunity to identify strategic initiatives to guide the staff in the future, and to formulate a mission and vision for the City. This retreat was facilitated by Ron Holifield, CEO of Strategic Government Resources and was attended by the Mayor, all Councilmembers, City Manager, and members of the City's management team.

The Retreat Agenda was divided into six major sections including:

1. Team Dimensions Assessment to Provide Insight into Shared Decision Making Styles and Strategies for Improved Decision Making
2. Review and Discussion of Effective Governance Practices
3. Review and Discussion Regarding the Strategic Visioning Process
4. Review of Current Strategic Goals, Values, Mission and Vision
5. Deliberation and Establishment of Strategic Goals for the Future

This report has been designed to generally follow in chronological order the flow of the actual retreat. The language refers to the Mayor and Council collectively as the Council.

Team Dimensions Assessment

Prior to the retreat, the Mayor and City Council members took an assessment called “Team Dimensions” which is designed to assess decision making styles and assist the Council in understanding how they make decisions collectively and individually.

The *Team Dimensions Profile*® identifies various roles that may come naturally to different people in the group.

Creators – generate new ideas and fresh concepts. They prefer to live world of possibilities and look for activities that are unstructured, abstract, and imaginative.

Advancers – communicate new ideas and carry them forward. They focus on the interactive world of relationships and often manage the human part of any solution.

Refiners – analyze ideas for flaws or revise projects systematically. They focus on the objective, analytical world of facts or theories.

Executors - deliver concrete results and seek successful implementations. They tend to be realists who pay attention to details and the bottom line.

Flexers – have an equal preference for most or all of the roles and can often adapt their styles to fit the team’s needs.

In short, the assessment suggested that a majority of the Council is weighted towards “refiners” and “creators”. Overall, many councilmembers seem to have a preference for the Refiner role. Oftentimes, groups with this pattern of results place a high value on logic and accuracy. They tend to be very reflective and perhaps even a little withdrawn or skeptical at times. This may create an environment where competency is very highly valued and people take their time to correctly resolve matters.

Effective Governance Practices

This part of the retreat began with a discussion of systems theory and the fact that the Lee’s Summit City Council is a system. As with all systems, certain behaviors will create predictable outcomes. A healthy governance system enables quality decision making and unhealthy governance systems create unhealthy decision making.

It was noted that any organization should care about healthy governance systems for the following reasons:

1. To increase efficiency, and reduce the time required to take care of business effectively. Unduly long decision making cycles tend to produce bad decisions.
2. To eliminate ambiguity and uncertainty for the council, the staff and all stakeholders. Trust is largely a product of predictability, and in an environment of unpredictability and ambiguity, low trust can result in bad decision making.

3. To help hold the Council as a body and each individual Council Member to higher standards of performance. It is impossible for staff to rise to a higher standard of performance than that attained by Council.
4. To help each individual Council Member take responsibility for their own actions and to make decisions for the good of the community not political power plays. This enables quality decision making.
5. To disagree without being disagreeable expends less fruitless energy. When undue energy is devoted to interpersonal conflict, less energy is available to deal with the major long term decisions that need to be wrestled with, thus leading to poor decision making.
6. In short, to enhance the quality of decisions you make and dramatically increase the significance of the impact those decisions have on the future

Following the “Why Care” discussion, the focus shifted to major challenges every governing body encounters to governing effectively. The key to success is confronting these challenges. The major items discussed include, but were not limited to, the following major challenges to effective governance:

1. Lack of clear mutual mission and vision
2. Lack of well-done agendas and packets
3. Lack of a culture of mutual respect
4. Lack of respect shown to the team with outside parties
5. Focus on management instead of governance
6. Lack of understanding of governance role and responsibilities
7. Lack of respect for staff from the dais
8. Lack of well-designed governance processes that are strongly enforced
9. Lack of mutual respect from the dais.
10. Lack of routine and effective long term thinking

Following the “Major Challenges” discussion, the focus shifted to the characteristics of an individual Council Member who governs effectively including:

1. Respects and communicates with each other and with staff, as well as with key constituencies
2. Doesn't judge motives prematurely

3. Doesn't disrespect staff, fellow Council members or citizens
4. Develops loyalty to the Council/Manager team as a cohesive group
5. Doesn't play "gotcha" with each other or with staff

Following the "individual characteristics" discussion, the focus shifted to the organizational characteristics of a governing body as a team which governs effectively including:

1. Takes a broad view of complex issues – doesn't seek perfection
2. Helps keep the organization focused on its mission, vision and core values
3. Emphasizes strategic planning and priority setting as a foundation for decision making
4. Constantly encourages councilmembers' education and self-evaluation
5. Holds staff accountable
6. Holds themselves and each other accountable to the adopted governance policies and to a culture of respectful interaction from the dais and elsewhere
7. Willing to lead despite opposition, while understanding the cost of decisions

Following the "governing body as a team" discussion the focus shifted to governing body roles and responsibilities including:

Five Areas of Responsibility for the Governing Body

1. Formulating the Mission, Vision, Values and Strategic Goals
2. Ensuring the financial health of the organization
3. Promoting efficient and effective management and systems
4. Ensuring quality of services
5. Monitoring governing body and organizational effectiveness in advancing the mission and in making the vision a reality.

Seven Governing Body Roles

1. External Communicators – protecting the integrity of the process more than any given decision
2. Internal Communicators – effectively listen to the community and serve as a compass to staff

3. Fiduciary Overseers – ensure that systems are in place which build trust among all stakeholders
4. Policy Developer – ensure that appropriate and effective policies are in place governing all aspects of the organization and ensure the pursuit of the mission not preservation of the status quo
5. Information System Overseer – make your decision making evidence-based and ensure that information systems in place produce good data
6. Priority Enforcer – ensure that the organization is doing things right AND is doing the right things
7. Strategic Visionary – define the mission, articulate core values, decide what you want to become, define what you want to achieve, understand where you are now, determine how to get to where you want to go

Following each discussion, one section of a *'Polarity Assessment'* was distributed for the Council to self-assess where the current governance environment was operating along the spectrum of two descriptors on each end describing a very healthy governance environment and an unhealthy governance environment.

Following the “role and responsibility” discussion, each Council member tallied their score for each section and then tabulated a combined score on all three sections of the overall Governance Polarity Assessment Scale combined. The gross scores for each Council Member were then reported and averaged to create an overall average score.

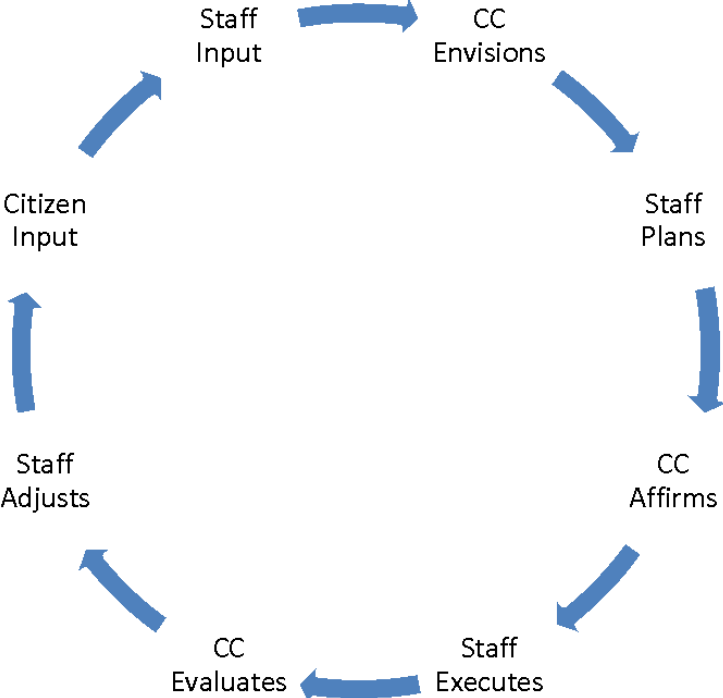
The overall average score fell in the 301-400 range. The descriptor for this range reads as follows:

Service on the governing body does not have to be this painful. Most of your pain is self-inflicted by the team. Lip service may be given to your governance policies, but they are frequently ignored or violated for political expedience. Violation of governance policies is justified in the mind of the violating member due to their commitment to the issue above their commitment to the integrity of the process. The team tends to divide along political lines frequently. Personal resentment may lie beneath the surface of policy discussions. Lashing out at staff is common. Outside assistance is needed to help take your governance culture to a healthier level. Attention needs to be given to your systems as well as your commitment to a healthy governance culture. The premier question is whether the governing body wants to have a healthier governance culture, or whether they want to keep fighting.

Strategic Visioning Process

Strategic Visioning is distinctly different from either strategic planning or visioning. Strategic planning is often unduly influenced by the current state, and focuses on moving incrementally forward from that current state. Strategic planning is beneficial, but strategic planning frequently fails to provide breakthrough opportunities to change a community’s destiny. On the other hand, visioning is often unduly influenced by grand visions of the future which may not adequately be based in evidence based assessments of what is realistically achievable. Both extremes are linear in their approach and tend to produce the same practical outcome... expensive consultant studies which sit on a shelf but never have a major impact on shaping the future of the community.

By contrast, Strategic Visioning is designed to create a bold vision of the future AND provide a very practical road map to make your vision a reality, while providing a reliable system for constant feedback and course adjustments. Instead of the linear approach of traditional strategic planning, the diagram below visually portrays the Strategic Visioning loop.



The Pillars of Strategic Visioning

Strategic Visioning builds upon 5 Pillars. These pillars support and give structure to both the process and the product. These include:

Strategic Thinking

The City Council is responsible for thinking strategically about the future and developing an inspiring vision that creates excitement and establishes the direction for the city as it moves toward the future. This is best accomplished in a retreat setting with a series of well-designed questions with professional facilitation which helps the Council engage in deep and meaningful discussions regarding the future.

Business Analytics

Good decisions demand good data. The more complex the issues are, and the longer term the horizon for the vision, the more critical it is to have good data to work with. Good data is not enough: the organization needs to be capable of interpreting and analyzing the data, as well as communicating it in easy to understand and compelling ways. This input includes an accurate analysis of current and anticipated trends, crucial issues, a fiscal forecast, the current comprehensive plan, and input from both staff and citizens.

Planning and Execution by Staff

Staff is responsible for developing and executing on action plans to achieve the Council's vision. These plans are developed in a feedback loop with the Council, so that there is clear understanding of the Council's vision, the mutually agreed upon goals, and the action plans to accomplish those goals.

Continual Alignment

To translate it from dream into reality, the vision must be in alignment with the city's purpose, its core values, and the master plan, as well as the real and perceived needs of the citizens. In turn, the goals, the objectives, and the tasks must be in alignment with the vision. Creating alignment with the annual budget and the Strategic Vision is critical to empower the city to accomplish the vision. Once alignment is achieved, leaders must be diligent to maintain alignment, including continuing adjustment of the vision based on new information, changing situations and new insights.

Communication and Feedback

A constant flow of communication and feedback must be maintained between Council and staff in order to maintain alignment, evaluate performance, and make necessary adjustments due to changing factors. This enables the leadership to keep the vision relevant, empowering and achievable.

Review of Current Mission, Vision, Values and Comprehensive Plan Five Overriding Principles

Existing Mission, Vision, Values

The Lee's Summit City Council had not previously formulated mission, vision, or values statements. In the absence of this guidance, city staff operated by focusing on the mission and vision statements created during the *LS360° Charting Tomorrow* community strategic planning process. This vision statement was created by stakeholders, community leaders, residents, city council members, and city staff who participated during the 2009 planning process.

The City Council reviewed and discussed the LS360° Vision Statement and generally agreed that it was a good statement. However, the consensus was that the term 'destination city' be replaced with 'distinctive city'. Additionally, the City Council expressed a desire to create a vision statement that collectively expressed the vision for the City Council.

LS360° Vision Statement

Lee's Summit is a sustainable and vibrant city with a dynamic spirit of cooperation among its diverse citizens, businesses, organizations, educational systems and governments.

Through comprehensive community planning and regional collaboration, Lee's Summit enjoys economic independence and a high quality of life as a recognized distinctive city.

City Council Vision Statement

As the elected body of the City of Lee's Summit, Missouri, we are collectively in pursuit of;

A culturally rich community with diverse economic sectors to create a prosperous and dynamic community in perpetuity.

Strategic Goals for the Future

Goals express and define future desired outcomes and are intended to guide decision making and behaviors. Goals are developed during the strategic visioning process which enables the City Council to strategically identify future direction. This continuous improvement process allows for goals to be modified, refined, and aligned to the City Council's vision.

Recommended Goals

These recommendations are based upon the Effective Governance Practices Presentation, the Council's *Team Dimensions Assessment*®, interviews, and council retreat discussions.

1. Determine the preference to operate in the governance model versus the political model. Council governance practices should be formally adopted that reinforce and support the type of governance culture the Council desires to establish.
2. Establish an environment that consists of healthy positive relationships to establish decorum and strengthen relationships between Councilmembers, the City Manager, and city staff through improved governance dynamics, while preserving a commitment to vigorous debate.
3. Establish clear policy expectations through an ongoing and routine strategic visioning process allowing for continuous improvement and ongoing refinement of council priorities to ensure vision alignment.
4. Develop standards for analysis and documentation that accompanies council meetings to ensure that staff presentations are aligned with Council's vision.
5. Emphasize citizen engagement and participation from the community.
6. Educate and include new council members in past and future visioning processes.

Goals developed by City Council

I. Improve the development and maintenance of infrastructure

Action Steps:

- Explore options for how projects can be accelerated.
- Provide a periodic update of infrastructure improvements
 - Update the Thoroughfare Master Plan
 - Establish a communication plan for infrastructure projects
- Review, adopt, and implement policies that ensure the development of quality infrastructure.
- Expand information technology based infrastructure

II. Embrace a culture that promotes aggressive and bold decision making

Action Steps:

- Develop an economic development strategic plan
- Commit to an effective governance model and continuous improvement process
 - Plan semiannual Council retreats and strategic visioning retreats
 - Communicate Council priorities and vision to stakeholders
 - Contextualize long term decisions that may not garner short-term political support.

III. Attract and retain “knowledge-based employers”

Action Steps:

- Establish policies, guidelines, and continually seek best practices for economic development activities.
- Establish performance measures for economic development
 - Measure performance of these employers using the State’s ‘quality job’ definition. Measure the ability to attract these employers.
- Partner with higher education institutions create to help attract “knowledge-based employers.”

IV. Preserve and enhance residential developments

Action Steps:

- Measure and monitor the real estate tax value of neighborhoods
- Provide solutions and choices to maintain and improve assessed valuation
 - Research and implement code enforcement programs that protect housing values
- Enhance role of City as a community connector

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