SUMMARY REPORT

City Council Retreat and Priority Setting Workshop

The City of Lee's Summit, Missouri
October 18-19, 2024

EVERSTRIVE
SOLUTIONS

Table of Contents

INTRODUCTION

EverStrive Solutions was engaged to facilitate a priority setting workshop for the City of Lee's Summit City Council on October 18-19, 2024. The workshop had three objectives:

1. Narrow the focus of the 2019 *Ignite! Your ideas. Our future.* Strategic Plan to 3-5 top priorities for the next two years.
2. Learn new skills and knowledge to reinforce teamwork among the City Council.
3. Same team, same page – initiate implementation planning for the City Council's priorities to ensure alignment with the staff Management Team.

This summary report offers brief descriptions of workshop activities and outcomes. The event slide deck with additional context is in **Appendix A**.

THE FOUR TENDENCIES

The Four Tendencies is a research-based framework developed by Gretchen Rubin that explains habits and how people tend to follow through with commitments. People tend to fall into four groups that suggest how they approach getting work done.

- **Upholders:** Upholders are highly self-motivated individuals who easily meet both internal and external expectations. They don't need much supervision, as they are naturally driven to follow through on commitments. Their sense of identity is closely tied to reliability, which makes them defensive when they feel they may have failed. They thrive on completing tasks, which can also lead to overcommitting if they don't carefully guard their time. While they excel at independently fulfilling responsibilities, they may need to practice patience with others, especially with obligers, who may require more external accountability. Upholders should also watch for signs of "tightening" — a tendency to become rigidly attached to routines and expectations.

  Lee's Summit Upholders: Bill Baird, Trish Carlyle, Faith Hodges, Beto Lopez, Cynda Rader

- **Questioners:** Questioners are analytical thinkers who need a strong rationale before meeting any expectation. They prioritize gathering information and making informed decisions, often requiring extensive details to feel confident in their choices. Because of this, they may come across as obstructionists if they question decisions without quickly aligning with the group. They prefer control over their decisions, disliking arbitrary rules and may find it challenging to move forward without satisfying their queries, which can lead to "analysis paralysis." To manage this, they may set deadlines or rely on trusted sources. Questioners should remember that sometimes action must proceed despite incomplete information.

  Lee's Summit Questioners: John Lovell, Mia Prier, Hillary Shields

- **Obligers:** Obligers are highly reliable in fulfilling external commitments but may struggle to meet personal goals. They're essential to team dynamics and often go above and beyond to

support others, even to the point of overcommitting. They benefit from incorporating accountability measures — such as deadlines, checklists, or accountability partners — into their workflows to help them stay on track. If obligers take on too much, they may experience "obliger rebellion," where they suddenly resist obligations as a form of self-preservation. Regularly checking in with themselves can help them avoid burnout and identify when they need to scale back.

Lee's Summit Obligers: Fred DeMoro, Mark Dunning, Ryan Elam, Donna Lake, Christal Kliewer-Weber

- **Rebels:** Rebels are independent thinkers who resist both internal and external expectations in favor of freedom and choice. They're motivated by their desire to act authentically, preferring self-directed approaches and resisting any form of control or restriction. Rebels are energized by the freedom to decide what, when, and how to approach tasks, and they often find motivation in aligning with their self-image rather than conforming to external standards. To stay productive, they might find value in creating rules that reflect their identity, like batching tasks for flexibility or setting "no-meeting" days. While they avoid rigid commitments, Rebels can be encouraged to consider certain actions by presenting them as choices aligned with their goals.

  Lee's Summit Rebels: None

CONTEXT FOR PRIORITIES

Prior to the workshop, most council members and the Management Team met with the consulting team to provide initial information and to help create an effective agenda. Summarized information from the advance interviews was shared with the City Council in this opening presentation to set a common foundation of knowledge prior to goal setting.

General Impressions

- The City Council benefits from strong professional expertise (legal, real estate, planning commission).
- The City has a track record of preserving public trust (support for sales taxes and bond issues).
- There is shared pride in community assets including public safety, parks, downtown vitality and public infrastructure.
- The City Council conducts business with strong professionalism and civility and genuinely cares for each other as people despite differences.

But there is also a disconnect on perceptions of the following:

- Tackling big issues – the City Council may be working well together in part because they have not confronted divisive issues.

- Commitment to the *Ignite!* Strategic Plan – There is mixed buy-in among the Council for the strategic plan and its validity as a representation of community will. There appears to be acceptance of the seven critical success factors but perhaps a lack of consensus about how to achieve them.
- Eroding trust – with each other and staff. Although there is confidence in the qualifications of staff, some feel staff is more responsive to the mayor than councilmembers. Internal divisiveness among Councilmembers is starting to become evident in public conversations.
- Engaging the public and weighing their input in decisions – there are mixed opinions about how and to what extent to engage public input for major decisions. Some believe that public engagement is lacking. Others feel that a few vocal naysayers can derail progress on community-supported plans.

WHAT'S YOUR WHY?

City Council members were asked to consider the following motivations for their public service:

- What inspires you to do this work?
- What do you hope the City will be known for during your time on the Council?
- What do you hope your legacy will be?

The following common themes emerged:

1. Council members made personal connections to their family and expressed desire to set an example of service to children and grandchildren. Many expressed a desire to give back to a community that has meant so much personally to their families.
2. Council members acknowledged their role as stewards, accepting that they inherited Lee's Summit and have a responsibility to deliver it better to future generations.
3. The Council wants to be known for its good work, reflecting values of transparency, efficiency, tenacity and integrity.

Council members were also introduced to the concept of the Public Service Values, originally developed by Dr. John Nalbandian: Accountability and Representation, Efficiency and Effectiveness, Social Equity and Diversity, and Justice and Individual Rights. The groups discussed and identified "default" values (where they go first), as well as discussed and identified the many hats elected officials are asked to wear.

GETTING THINGS DONE

The Council reviewed the process for assigning committees and setting committee agendas. There was some frustration with the frequency of meetings and the inherently slow process to move work forward. There seems to be understanding of how work is assigned to committees, but there is less clarity about how work is monitored through completion. Council members may need to take more ownership to monitor and advocate for issues of importance to them. There was a desire for more training and orientation when onboarding new city council members. This may include formal training and informal mentoring with more seasoned council members to help newly elected

officials learn the nuances of building consensus and advancing their priorities. There was a desire to have items of higher complexity and importance worked directly through the City Council in discussion (non-action) meetings instead of through committees.

PRIORITY SETTING

EverStrive presented the rocks-pebbles-sand analogy that is a popular time management metaphor for prioritizing workload. This approach is designed to focus on the most important tasks, or Big Rocks, first, so they get done and aren't buried by smaller tasks. For this conversation, Big Rocks are multi-year initiatives that will have a generational impact on the community and need to be built from the ground up; Little Rocks are routine or ongoing initiatives where processes and frameworks are generally established; and Sand are tactical items that can be accomplished within the year.

The Council worked in small groups to brainstorm priorities in each of the three categories. Duplicates were identified and suggestions were grouped into these broad categories. Council used a dot voting exercise to identify top priorities within each category, as follows.

Category	Priority	Priority Voting	
		Votes	Vetoes
Big Rocks	Housing	9	0
	Beautification	6	1
	Stormwater Management	6	0
	Solid Waste	4	0
	Economic Development Strategy	2	0
Little Rocks	Maintaining elite public safety status	7	0
	Internal and external communications	5	0
	Downtown infrastructure	5	0
	Reviewing the selection process for the charter review commissions and citizen boards/commissions	4	2
	Sidewalk (plan to fill gaps) including a specific request for the north-south connection on 4th St. downtown	4	0
	Citywide marketing/rebranding	2	2
Sand	Better training (new council orientation) and camaraderie (staff appreciation and helping City Council feel connected)	13	0
	Visible tax dollar projects (safety mirrors, landscaping, sidewalks)	12	0
	Better public education about process for street overlays and curb replacements	2	0

The Management Team simultaneously grouped priorities across the critical success factors of the *Ignite!* Strategic Plan and found the strongest alignment in Community Engagement (8), City Services and Infrastructure (9), Cultural and Recreational Amenities (3), Strategic Economic Development (2), and Strong Neighborhoods (1).

After identifying the top priorities, Council members and members of the Management Team self-selected to work in small groups according to each priority to begin developing an implementation strategy for each. There were two small group rotations for the Big Rocks to give participants a chance to work on two of their top priorities. There was one rotation for the four highest priority Little Rocks.

Groups were asked to identify:

- Where will you start? What additional information and direction is required to get started on this priority?
- How will you advance? What resources or community engagement are needed to make timely progress?
- Where will you end? What does success look like if this priority is accomplished?

BIG ROCKS	
Beautification	- Support Cultural Commission - Create a clear vision for beautification: - Get more compliments than complaints - Have a distinctive image - Improve the cooperative relationship with MODOT - Review current standards and procedures for right-of-way and facilities - Identify gateway corridors for prioritization on beautification. Propose a plan for improving beautification. - Research best practices for coordinating with MODOT to improve maintenance of state-owned bridges and overpasses. - Present an innovative partnership to MODOT. - Ensure that city-maintained corridors meet Council expectations. - Execute and share results with the community for feedback.
Housing	- Start with research and benchmarks. Define terms: housing types, ownerships models, affordable vs. attainable vs. luxury. - Get a baseline of projects that have been implemented and approved. How many units of what types already exist in what locations? What are the gaps? - Identify policy levers and implementation. Move from discussion to <u>action</u>. - Zoning – incentives - Infrastructure provision – LIHTC projects - Land bank - Federal funds – programs - Community education - Land Clearance Redevelopment Authority (LCRA) - Other tools?

Housing, cont.	• Review the Comprehensive Plan for balance of housing choices • Revitalize older neighborhoods to create interest in attainable housing for first time buyers • Public education and developer outreach • Success is: More units, attainable units, balance and housing choice, spectrum of housing choices for all stages of life

Solid Waste	• Start the statutory two-year notification process.
	• Determine preference for one or multiple haulers (i.e., quadrants)
	• Determine scope of regulations (residential only or commercial too)
	• Research best practices of communities that have consolidated solid waste collections
	• Determine the impact of current practices in Lee's Summit (litter, pavement conditions, choice, environmental impacts)
	• Success is measured by:
	    ○ Debris management
	    ○ Eliminating dumping of bulky items
	    ○ Resolving unclear direction to staff
	    ○ Reduction of waste – better recycling education
	• Barriers to overcome:
	    ○ Desire for choice
	    ○ Pressure from haulers
	    ○ State regulations/HOA restrictions

Stormwater	1. Define expected level of service
	    • x-year flood event
	    • Maintenance plans vs. new construction
	    • Public education
	    • Recreation and beautification
	2. Develop a five-year plan.
	3. Identify appropriate funding source (tax or fee).
	    • All properties or problem areas?
	    • Credit for mitigation
	    • Existing revenue vs. new fee
	    • Property buyouts
	4. Prepare for future maintenance issues (design and development standards).
	5. Adopt a stormwater utility.

LITTLE ROCKS	

Board, Commission, Charter Selection Process	• Charter
	    o Determining the number and method of selection (clarity and resolution)
	    o Community engagement and education
	    o Propose charter amendment(s) for public vote
	 • Re-evaluate the process for selecting members for boards and commissions
	    o Advice and consent by the Council by a vetting process

Public Safety	• Start with research and best practices – to whom are we losing? • Review current position in the job market • Timing/goodwill • Technology coordination • Global public safety view • We have done well in this area. What's next? Don't lose momentum or reputation.

Internal/External Communications	**External**
	 • Research Best Practices of Peers
	    o Cities with strong social media presence – examples of success and failures
	    o Are member 3CMA for ideas from peers
	    o Identify different types of communication needs – crisis communications
	 • Education on distribution channels
	    o Consider a single source, fact-based information hub (website?) that connects to other channels
	 • Get information direct from the source – Council/staff
	
	 Internal
	 • Revive the weekly report with citywide and district updates
	 • Set clear communication expectations between staff and Council
	 • Create a SharePoint page with information for City Council – easy to reference and keep track

Sidewalks/Downtown Infrastructure	- Start with Safe Routes to Schools - Start with an inventory to identify and prioritize gaps - Priorities - Schools - Parks - Downtown - Maintenance vs new (determine allocation of resources) - Fixing small gaps vs large areas that have missing sidewalks or not built to code - Consider different options and costs - Sidewalk vs - Sidewalk with curb, gutter, street overlay - Funding sources - Specific downtown infrastructure revitalization program - Separate sidewalk budget for missing gaps - Current code and piecemeal sidewalk – both sides vs one side - Fee or developer costs? - Evaluate the costs of sidewalk standards

RECOMMENDATIONS

- **Prioritize Research and Best Practices**: Since many key priorities rely on thorough research and benchmarking, we recommend that each initiative start with an assessment of current best practices. This approach will ensure that the City Council can base its strategies on proven, effective methodologies. Assigning specific teams or consultants to conduct this research will help to provide a solid foundation for all major initiatives.

- **Reassess Committee Structure**: The current committee structure may benefit from reconsideration. Committees can remain valuable for routine or administrative items, but items of significant importance should go through the full council, ideally in structured work sessions. This process can enhance transparency, encourage broader council engagement, and increase the likelihood of successful outcomes. Consider whether eliminating or reducing committee roles might streamline decision-making, with routine items delegated to staff and more consequential matters elevated to the council.

- **Enhance Informal Communication Channels**: To foster a collaborative culture, we recommend increasing informal dialogue opportunities. The mayor and/or city manager can take the lead in establishing a tone of approachability and openness by regularly meeting with council members one-on-one, arranging opportunities to build stronger relationships with each other and as a group, and proactively addressing issues as they arise. These efforts will build rapport, strengthen cohesion, and encourage open communication. Informal communication channels should not supplant or detract from the Council's responsibility to conduct official business in open session.

- **Revise the Board and Commission Selection Process**: The current process for board and commission appointments could benefit from a review and update to ensure transparency, inclusivity, and alignment with city priorities. Creating a more structured and equitable selection process will help attract qualified and diverse candidates who reflect the community's values and goals.

- **Engage Management in Priority Implementation**: We recommend involving the city's Management Team directly in the planning and implementation of council priorities. By doing so, all departments will share ownership of these goals, fostering cross-departmental support and ensuring alignment. Even departments not directly impacted by certain priorities should stay informed, as they may need to adapt resources and timelines to accommodate cross-functional needs. Follow-up through a staff retreat or similar engagement can facilitate these discussions, setting clear expectations and enhancing cohesion.

CITY OF LEE'S SUMMIT, MISSOURI

CITY COUNCIL RETREAT

EVERSTRIVE
SOLUTIONS

" WHERE BIG IDEAS MEET A WHOLE LOTTA GET IT DONE. "

- Board and Staff Retreats
- Business Operations Analysis
- Executive Leadership Development
- Facilitation
- Four Tendencies Training
- Interim Roles
- Management Training

- Process Improvement
- Policy Development
- Recruiting
- Special Projects | Surge Capacity
- Strategic Planning
- Team Dynamics

RETREAT ROAD MAP

TEAM GROUND RULES:

- Be engaged and fully present
- Participate by sharing **and** listening
- Stay in our lanes
    - City Council: This is your day
    - Staff: Support and seek clarification
- Strive for consensus
- Disagree agreeably and assume positive intent
- Practice "yes, and" rather than "yes/no, but"
- Relax and have fun!

THE FOUR TENDENCIES

EVERSTRIVE
SOLUTIONS

TAKE THE QUIZ:

GRETCHEN RUBIN

Author and Researcher
Kansas City Native
Self-Proclaimed Happiness Bully
Upholder

HOW DO I RESPOND TO EXPECTATIONS?

Outer
Expectations

Inner
Expectations

UPHOLDER

Meets outer expectations
Meets inner expectations

QUESTIONER

Resists outer expectations
Meets inner expectations

OBLIGER

Meets outer expectations
Resists inner expectations

REBEL

Resists outer expectations
Resists inner expectations
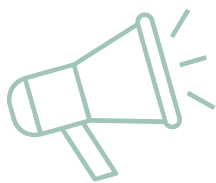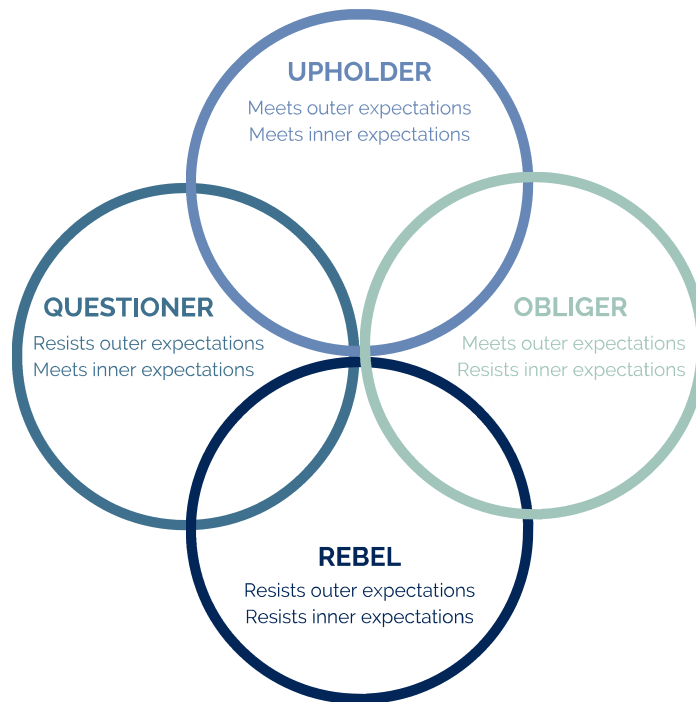
ROLL CALL

UPHOLDER | OBLIGER | QUESTIONER | REBEL

UPHOLDER
19%

QUESTIONER
24%

OBLIGER
41%

REBEL
17%
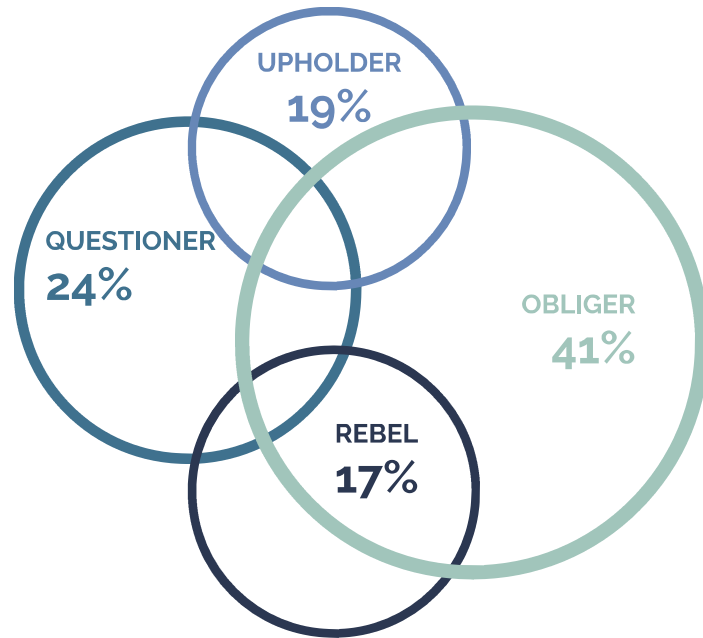
UPHOLDERS

- Embrace both inner and outer expectations

- Don't want to fail others, but they don't believe in failing themselves either = balance + boundaries

- Comforted by meeting expectations

- Need to watch out for "tightening"

UPHOLDERS

Inner Rules

Outer Rules

UPHOLDER

QUESTIONER

OBLIGER

REBEL
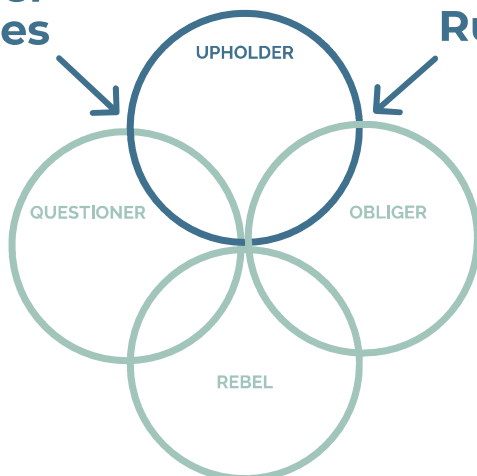
SHARE: UPHOLDERS

- Upholders: Does this resonate?
- Who do you know that's an upholder?
- Share a story or an example.
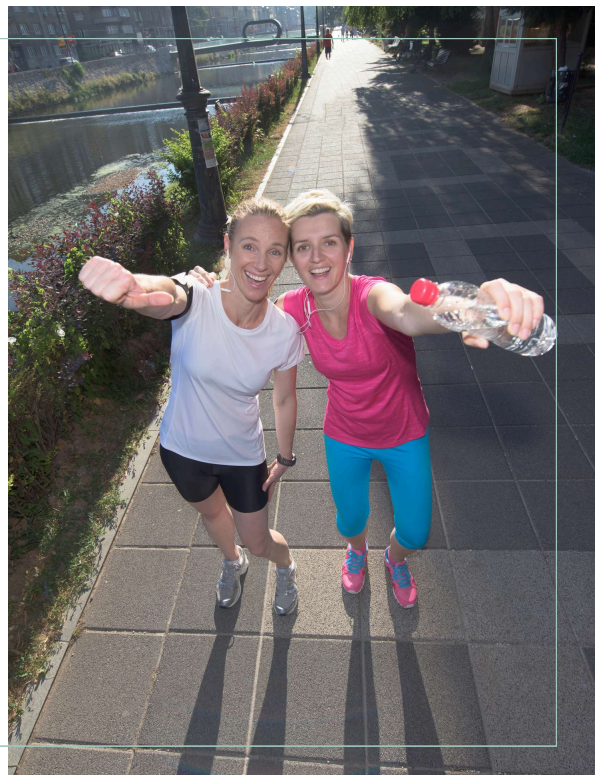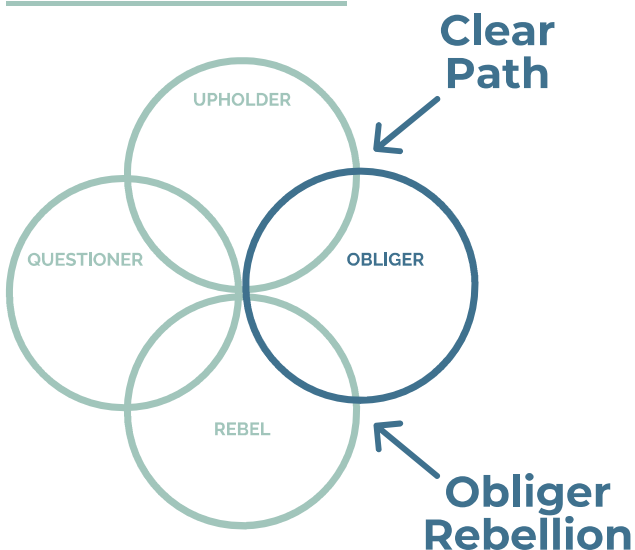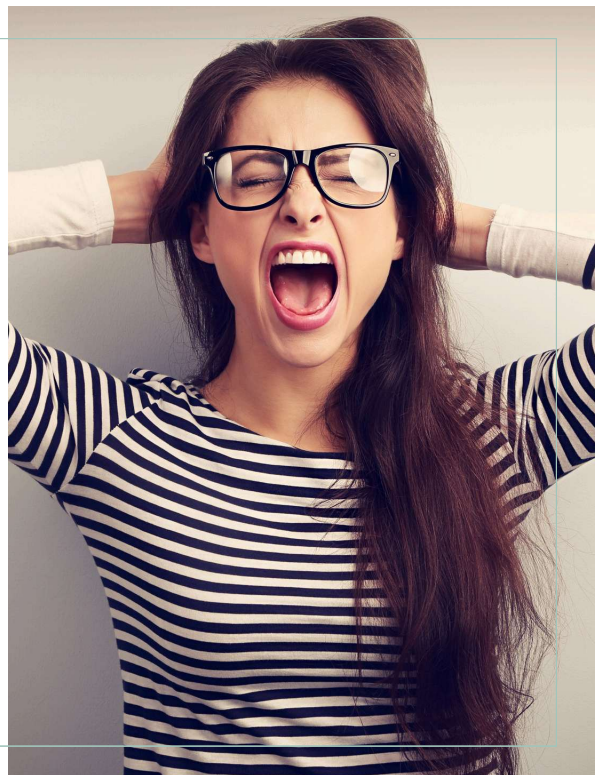- What do you better understand about them now?

QUESTIONERS

- Do well achieving their own expectations but often fail to live up to those of others

- Understanding the "why" is key - need to meet an information threshold

- Value effective and efficient systems

- Can suffer from analysis paralysis

QUESTIONERS

Outer Rules

UPHOLDER

QUESTIONER

OBLIGER
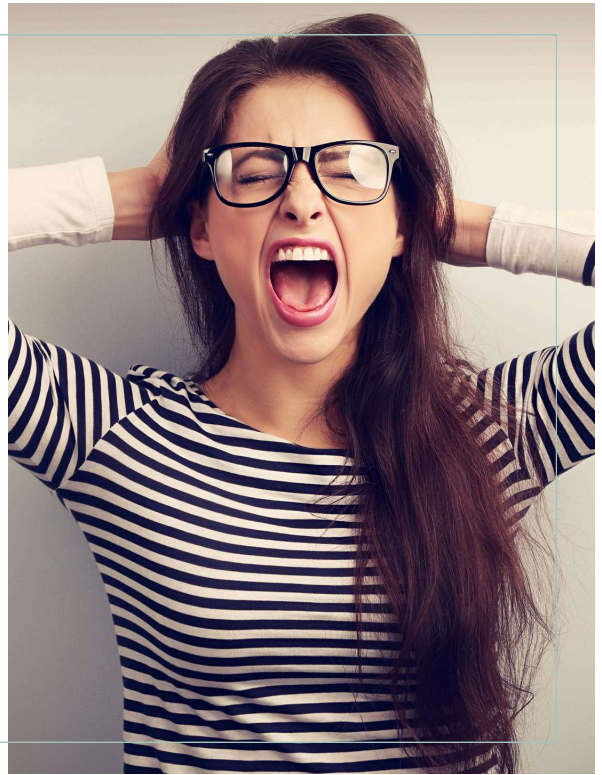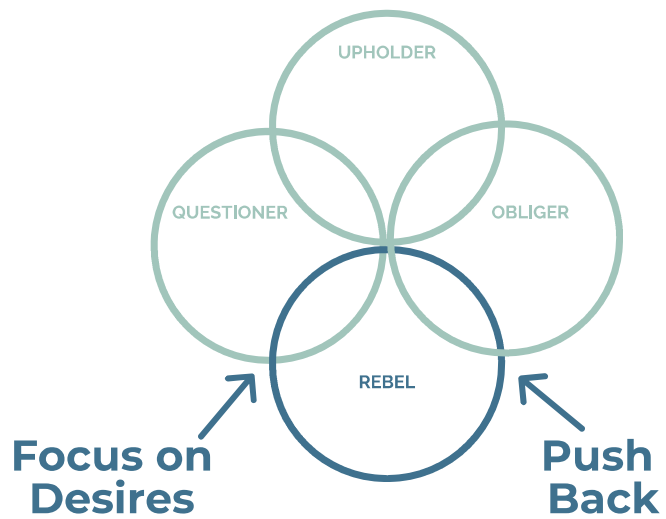
REBEL
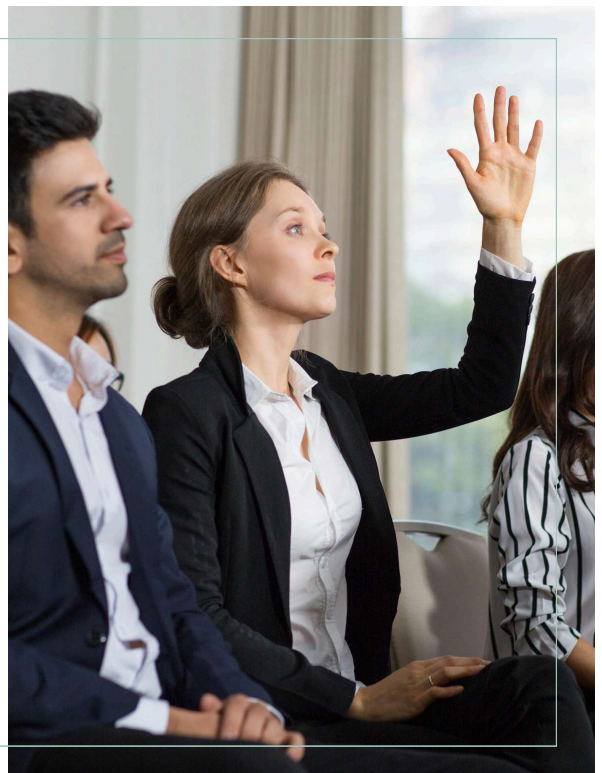
Rejects Rules
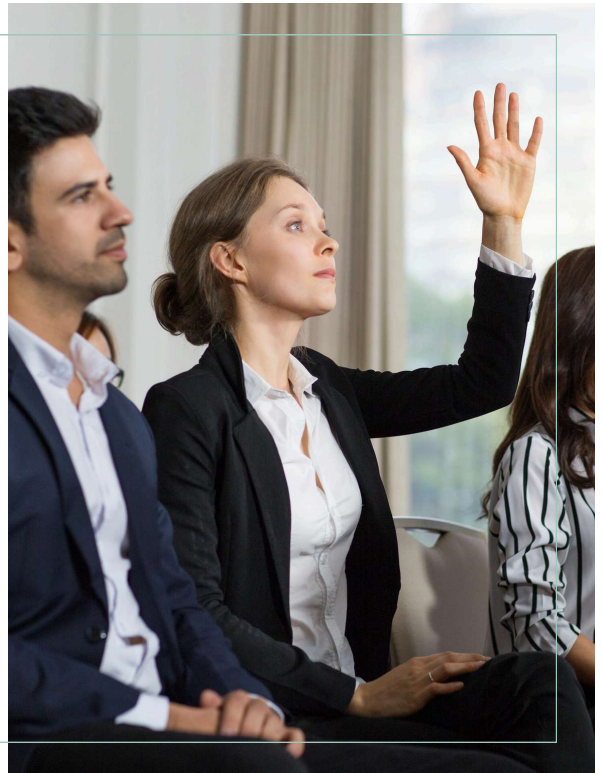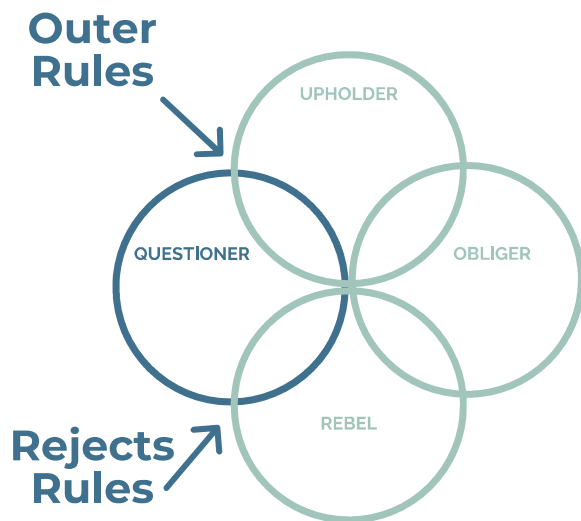
SHARE: QUESTIONERS

- Questioners: Does this resonate?
- Who do you know that's a questioner?
- Share a story or an example.
- What do you better understand about them now?

OBLIGERS

- The "people pleaser" - easily meet outer expectations but struggle to meet inner expectations

- Creating outer accountability is the key to success

- Susceptible to overwork and burnout

- Can suffer from "Obliger Rebellion"

OBLIGERS

Clear Path

UPHOLDER

QUESTIONER

OBLIGER

REBEL

Obliger Rebellion
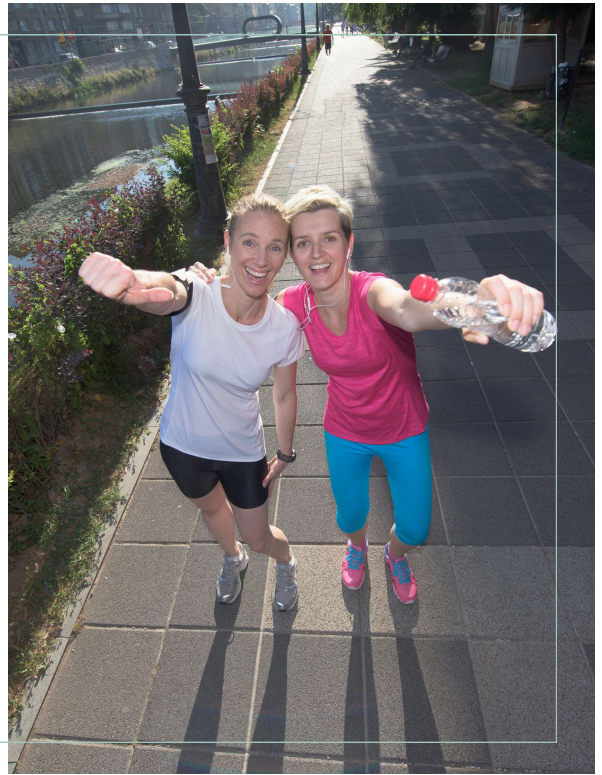
SHARE: OBLIGERS

- Obligers: Does this resonate?
- Who do you know that's a obliger?
- Share a story or an example.
- What do you better understand about them now?

REBELS

- Resist both inner and outer expectations

- Value freedom and authenticity

- Can do anything they **WANT** to do

- Struggle with routines and planning

- Respond best to Information + Consequences + Choice

REBELS

UPHOLDER

QUESTIONER

OBLIGER

REBEL

Focus on Desires

Push Back

SHARE: REBELS

- Rebels: Does this resonate?
- Who do you know that's a rebel?
- Share a story or an example.
- What do you better understand about them now?

USING THE TENDENCIES TO UNDERSTAND AND INFLUENCE OTHERS

UPHOLDER
19%

QUESTIONER
24%

OBLIGER
41%

REBEL
17%
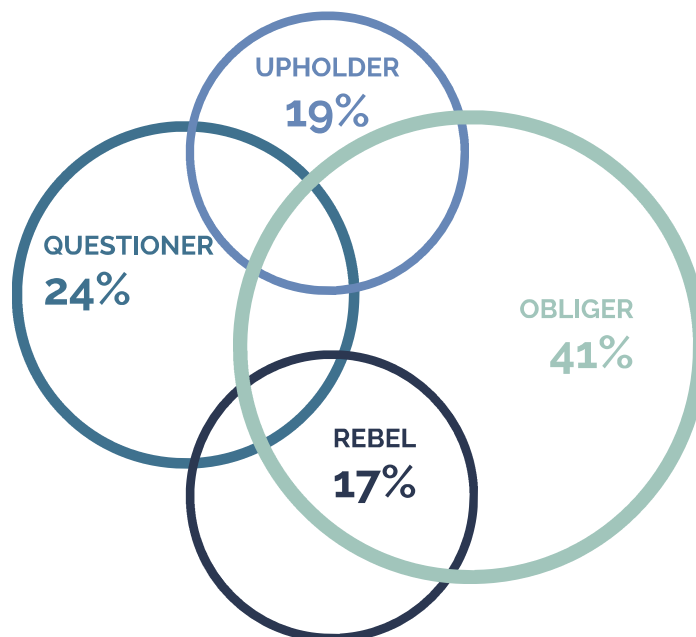
UPHOLDERS

How to Identify:
- Often prefer solo activities
- Consistently follow through

How to Motivate Them to Action:
- Know what they value, and honor that – be punctual and prepared
- Know the details, and be diligent about information
- Appeal to sense of responsibility

Their Love Language:
- Being rewarded and recognized for excellence and productivity

QUESTIONERS

How to Identify:
- Information junkies; motivated by logic and reason
- Do they read instruction manuals? Go to trivia night? Provide a lot of context and details?
- Ask a lot of questions

How to Motivate Them to Action:
- Give them a sense of logic and reason; make the next step make sense to them
- Don't push them; logic will drive them, but not emotional pulls or surface-level asks

Their Love Language:
- Being rewarded and recognized for metrics and efficiency

OBLIGERS

How to Identify:
- Prefer group work or being part of something structured
- Accountability is important

How to Motivate Them to Action:
- Make sure they are all in.
- Create tangible action steps
- Have an accountability structure in place

Their Love Language:
- Being rewarded and recognized for efforts that go the extra mile
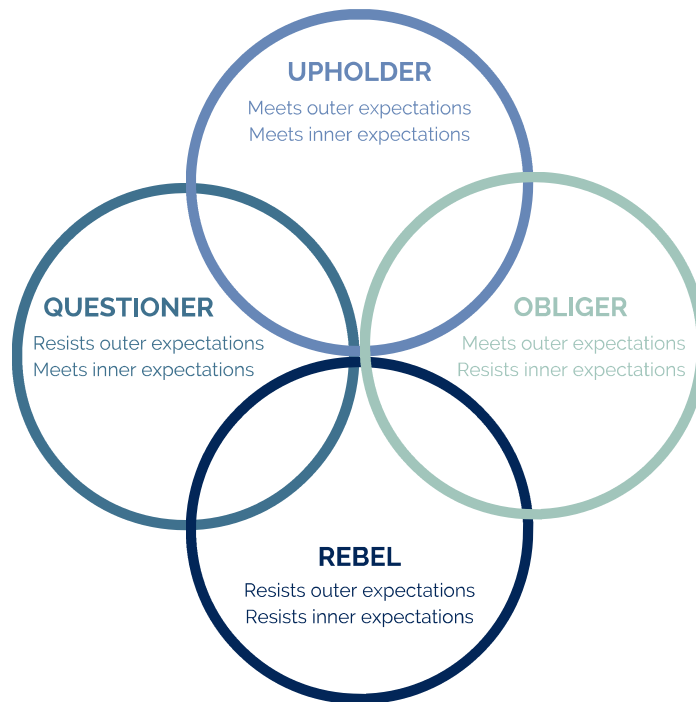

REBELS

How to Identify:
- Resist rules and control - values freedom and choice
- Identity and sense of self important

How to Motivate Them to Action:
- Give them a choice
- Acknowledge their rebellious nature, they actually generally appreciate that

Their Love Language:
- Being rewarded and recognized for thinking outside the box and flexibility

UPHOLDER

Meets outer expectations
Meets inner expectations

QUESTIONER

Resists outer expectations
Meets inner expectations

OBLIGER

Meets outer expectations
Resists inner expectations

REBEL

Resists outer expectations
Resists inner expectations

CONTEXT FOR THE CONVERSATION

GENERAL IMPRESSIONS

- Strong professional expertise (legal, real estate, planning commission)

- Strong public trust (support for sales taxes and bond issues)

- Pride in public safety, parks, downtown vitality, infrastructure

- Strong professionalism and civility; and genuine care for each other as people

WHERE IS THE DISCONNECT?

- Tackling big issues

- Commitment to *Ignite!*

- Eroding trust – with each other and staff

- Engaging the public and weighing their input in decisions

TACKLING BIG ISSUES

- Council works well together and doesn't push things off.

- Council disagrees, but it is not contentious. Very respectful.

- Council is putting off big issues because Council isn't ready to handle them

- Work well on the dais because haven't had to make hard decisions.

- Lack of trust behind the scenes is seeping out publicly into factions and gossip.

COMMITMENT TO THE STRATEGIC PLAN

- Ignite! is stagnant. It's not been kept it front and center.

- The Council is not familiar with it at all.

- We talk about Ignite! often. It is frequently referenced as influential for developments or policy recommendations.

TRUST AND CONFIDENCE IN STAFF

- Council is very complimentary of staff.

- The City has recruited great talent with low turnover.

- There is skepticism of staff. They are perceived as loyal to the Mayor and less responsive to other council members. Council needs to empower staff.

TRUST AND CONFIDENCE IN STAFF

- We need more public engagement.

- A few naysayers can derail plans that were made with extensive community input.

- Rhetoric can be overwhelming and baffling.

WHERE IS THE DISCONNECT?

- Tackling big issues

- Commitment to *Ignite!*

- Eroding trust – with each other and staff

- Engaging the public and weighing their input in decisions

SO, WE TALKED TO STAFF…

ON THE HORIZON

- Affordable housing

- Stormwater infrastructure

- Sustaining public safety

- Equity and inclusion

- Solid waste management

- 2026 Charter Review

- What else?

RETREAT GAMEPLAN

Strategic Plan: Narrow the focus of the Ignite! plan into 3-5 big ideas for the next two years.

Reinforce Teamwork

Same Team, Same Page: Set team expectations for communication and getting work done.
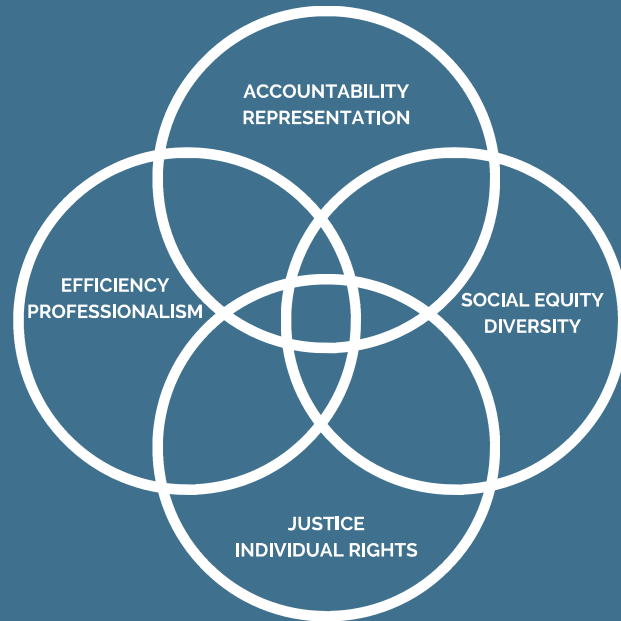
WHAT'S YOUR WHY?

WRITE ONE PARAGRAPH TO SHARE:

- What inspires you to do this work?

- What do you hope the City will be known for during your time on the Council?

- What do you hope your legacy will be?

"Good politics is about values not right answers."

John Nalbandian

ACCOUNTABILITY
REPRESENTATION

EFFICIENCY
PROFESSIONALISM

SOCIAL EQUITY
DIVERSITY

JUSTICE
INDIVIDUAL RIGHTS

ACCOUNTABILITY AND REPRESENTATION

- Responding to the will of the people

- Public involvement in the governing process is essential for its legitimacy

- Can be either from a "trustee" perspective or a "representative" perspective

EFFICIENCY AND EFFECTIVENESS

- Focuses on the "how"

- Respect for the analytical process and details

- Being good stewards of public resources

- Staff likes to live here
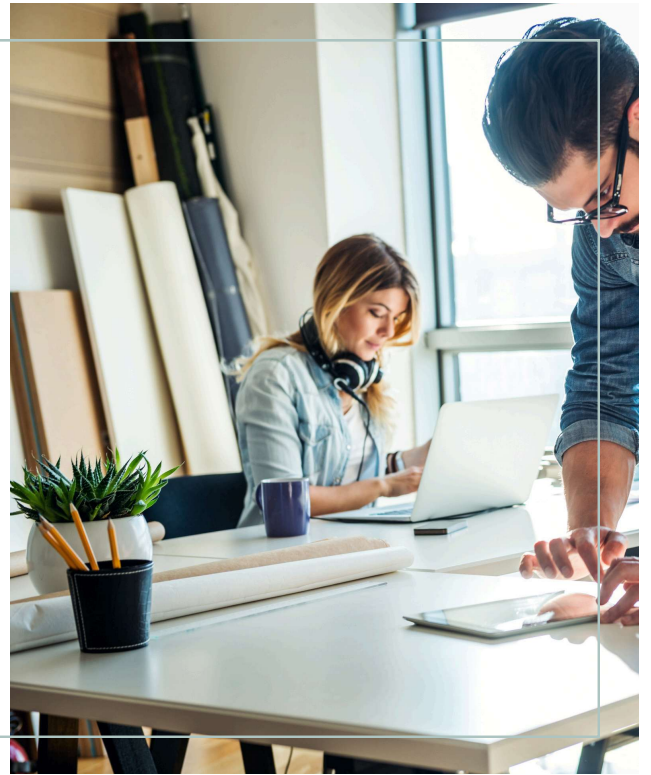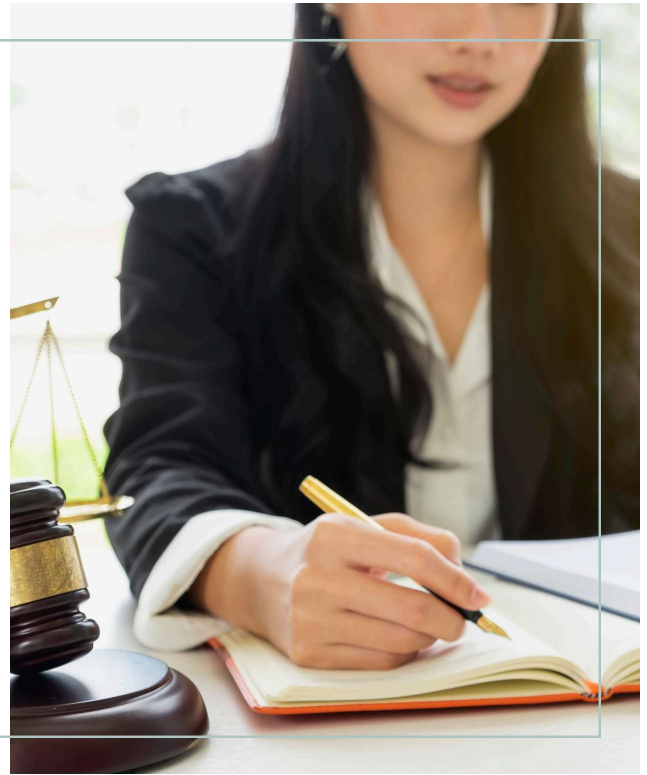
SOCIAL EQUITY AND DIVERSITY

- Respect for the differences within our community

- Address access and representative issues

JUSTICE AND INDIVIDUAL RIGHTS

- Property and individual rights granted through ordinances, statutes, and laws

- We like to create "rights"

---

pOLITICS = Playing with Values to Get Things Done

SOCIAL EQUITY DIVERSITY

JUSTICE INDIVIDUAL RIGHTS

EFFICIENCY PROFESSIONALISM

ACCOUNTABILITY REPRESENTATION

VALUES | A REAL WORLD EXAMPLE
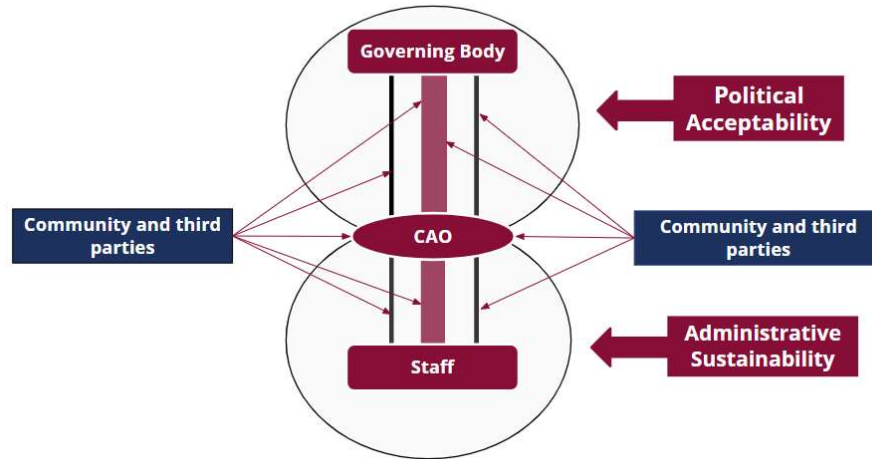
OBSTACLES TO COUNCIL EFFECTIVENESS

- Conflicting political values

- Absence of hierarchy

- Council and staff speak different languages

TENSION BETWEEN POLITICAL ACCEPTABILITY AND ADMINISTRATIVE SUSTAINABILITY

ELECTED OFFICIALS WEAR LOTS OF HATS

BIG PICTURE THINKER

TRUSTEE
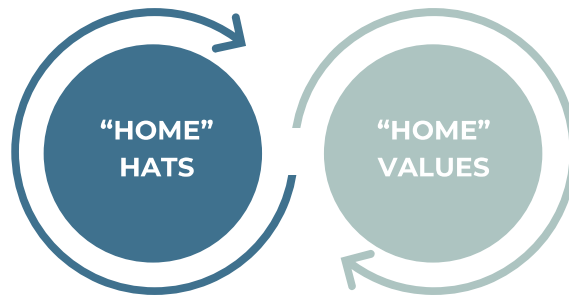
CUSTOMER SERVICE AGENT

COMMUNITY BUILDER

DECISION MAKER

OVERSIGHT

EXERCISE: HOW DO YOU COME TO THE TABLE?

"HOME" HATS

"HOME" VALUES

- How do you see this influencing your why statements?
- How does your perspective help the council work better together?
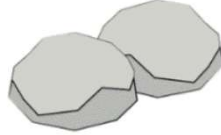

GETTING THINGS DONE

DAY ONE

CITY OF LEE'S SUMMIT, MISSOURI

CITY COUNCIL RETREAT

EVERSTRIVE
SOLUTIONS

"IF THE BIG ROCKS DON'T GO IN FIRST, THEY AREN'T GOING TO FIT IN LATER." STEVEN COVEY

BIG ROCKS
Highest priority projects and tasks.

LITTLE ROCKS
Urgent or important priority projects and tasks.

SAND
Unimportant projects and tasks.

IMAGE SOURCE: PROCESS HACKER

CITY OF LEE'S SUMMIT, MISSOURI

CITY COUNCIL RETREAT

EVERSTRIVE
SOLUTIONS