



Memorandum

Date: March 29, 2019

To: Honorable Mayor and Members of the City Council
Steve Arbo, City Manager

CC: Management Team

From: The Novak Consulting Group

Subject: Strategic Planning Retreat Preparation and Agenda

We look forward to being with you on April 5th - 6th. The purpose of this session is to articulate the Vision and Critical Success Factors that will serve as a Framework for the City's Strategic Plan.

Schedule

The Strategic Planning Retreat will be held at the Water Utilities Facility on Friday, April 5th from 4:00 pm to 7:00 pm and on Saturday, April 6th from 8:30 am to Noon.

Strategic Planning Process

At its most basic level, a strategic plan exists to answer three questions:

- What do we know to be true today?
- Where do we want to be in the future?
- How can we get there?

The process for Lee's Summit has included the following steps to date:

- Individual interviews the Mayor and members of the City Council
- Meetings with the City Manager and Management Team
- 2 community meetings; 8 community focus group sessions
- Online input using LSignite.net
- Employee survey
- Environmental Scan preparation

During our time together, the Council will be asked to develop the Strategic Planning Framework:

- Vision – The Vision Statement is aspirational, intended to reflect what you hope will be true for Lee's Summit in the future.
- Critical Success Factors – Those “things that must go well” in order for Lee's Summit to be successful in supporting the Vision.

Once the framework is agreed upon, we will solicit additional input from the community before coming back to work with the Council on identifying specific initiatives – or “to dos” – that will guide the City’s work plan for the next 12-24 months.

Preparation

As you prepare for the retreat, it will be helpful for you to spend time contemplating your hopes for the future of Lee’s Summit, as well as two specific “homework” assignments.

Environmental Scan

Please take the time to read and consider the Environmental Scan. It provides a common base of knowledge to inform and shape your participation in the strategic planning retreat.

This I Believe

During the retreat, each member of the governing body will be given 5-7 minutes to share "what they believe" about the future of Lee’s Summit. This exercise is loosely based on the "This I Believe" essay format initiated by Edward R. Morrow on National Public Radio in the 1950s. Today, there is an international organization that engages people in writing and sharing essays describing their core values that guide their daily lives. You are invited to share what you personally believe to be true about the future of the community.

- Tell a story: Be specific. Take your belief from the events of your life that have shaped how you look at and experience "community" in Lee’s Summit.
- Name your belief: Focus on a core belief and talk about why it is true.
- Be positive: This is what you DO believe about the future of Lee’s Summit, not what you DON'T believe. Avoid speaking in the editorial "we" and make sure this is about what you believe. Speak in the first person.
- Be personal: Write in words and phrases that are comfortable for you to speak.
- Remember to share not only “what” is important about the future of Lee’s Summit, but also “why” it is important to you and ultimately to the community.

Retreat Goals:

- Develop the Strategic Planning Framework.

Norms:

- Listen with respect
 - Let others finish before you start talking
 - Disagree agreeably
- Be:
 - **BOLD**
 - positive and realistic
 - candid and honest
 - patient and self-aware
 - engaged and fully present
- Strive for consensus
 - Look for opportunities to agree
- Remember the power of “if” and “and”
- Have fun!

Agenda

Day One – Friday, April 5th 4:00 pm – 7:00 pm

Setting the Stage

- Welcome and Introductions
- Agenda Review
- Norms and Expectations for the retreat

Agenda Item Outcome: Create a safe environment for honest exchange of ideas.

"This I Believe..."

- Each member of the governing body will be given an opportunity to share their "belief" about the future of Lee's Summit.

Agenda Item Outcome: Develop an understanding of the various perspectives of individual members of the governing body.

The Environmental Scan

- An overview of the Environmental Scan will be shared with the group.
- Participants will be asked to share insights gained and how this data informs the strategic planning process.

Agenda Item Outcome: Establish a common foundation of knowledge around what we know to be true today about Lee's Summit.

Sharing a Common History

- What are the events, people, and actions that have shaped Lee's Summit in the past?
 - Pre-1979
 - 1979 – 1988
 - 1989 – 1998
 - 1999 – 2008
 - 2009 – Today

Agenda Item Outcome: Develop a shared understanding of our relevant past.

Defining Our Legacy

- How do you want this next decade to be characterized by people in the community in 2029?

Agenda Item Outcome: Imagine a bold future for the community.

Adjourn for the Day

Day Two – Saturday, April 6th 8:30 am – Noon

Check-in

- Process day one and confirm agenda for the day.

Agenda Item Outcome: Adjust the agenda as needed to better serve the process.

The Strategic Planning Framework

- Vision – The Council will be asked to consider, refine, and finalize a Vision Statement.
- Critical Success Factors – What are the “big buckets” of things that must go well in order to achieve the Vision?

Agenda Item Outcome: Clarify and reach agreement on the strategic planning framework.

Closing/Next Steps

- Review key discussions and agree on next steps where appropriate.

Agenda Item Outcome: Clarity regarding the path forward.