



Memorandum

Date: June 7, 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 Preparation and Agenda

Michelle Ferguson and Julie Gieseke look forward to being with you again next week for the second and final Strategic Planning Retreat. The purpose of this memorandum is to help you prepare for the retreat and share the agenda.

Schedule

The Strategic Planning Retreat will be held at the Missouri Innovation Campus, Room A224, on Friday, June 14th from 4:00 pm to 7:00 pm and on Saturday, June 15th from 8:30 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 throughout the process
- Employee survey
- Environmental Scan Preparation
- Council retreat in April
- 2 community meeting to receive feedback on the draft strategic plan framework

During the meeting on June 14-15, the City Council will be asked to finalize each element of 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

- Mission - the role and purpose of City government – frequently expressed in statements about who we are, what we do, and why we do it
- Values – organizational values guide behavior – whether stated or unstated – and are observed when the workforce is “at its best”
- Critical Success Factors – those ‘things that must go well’ in order for Lee’s Summit to be a successful community

At the retreat, the Council will hear a summary of the community input received on the draft framework and the specific initiatives that would advance each of the Critical Success Factors. The Council will then be asked to finalize the framework and identify priority initiatives.

Preparation

The proposed Strategic Planning Framework is embodied in the Vision and Critical Success Factors. The Critical Success Factors will provide a structure for the Council to identify “Priorities” and “Initiatives” that move the City towards the Vision.

At present, there are seven Critical Success Factors. In preparation for the retreat, brainstorm and articulate individual projects or policy initiatives you believe are important for each Critical Success Factor. As you consider new initiatives, please remember:

- This is your chance to be BOLD and share your ideas with your colleagues and set the stage for developing a shared work plan.
- Remember to share not only “what” is important, but also “why” it is important to you and ultimately to the community.
- Think of framing the importance of each initiative in the context of the “problem being solved” or “opportunity being seized,” and be clear about what success looks like.

A worksheet is included in this memo for you to use in brainstorming. Please come prepared to share with the group your input on the projects and policy initiatives that you would like to encourage the City to take on for the next two years.

Strategic Planning Worksheet

Critical Success Factor	Projects	Policy Initiatives
Balanced Economic Development		
Strong Neighborhoods with Housing Choices		
Cultural and Recreational Amenities		
Inclusive Community Engagement		
Community Health and Wellbeing		
Collaborative Relations with Education Partners		
Proactive Infrastructure Development		

Retreat Goals:

- Ensure the Strategic Plan is reflective of the Vision and Priorities of the City Council and the community
- Articulate priorities to focus the energy and resources of the City organization for the next 12 to 24 months

Norms:

- Listen with respect
 - Let others finish before you start talking
 - Be attentive to the speaker
 - 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, June 14th 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

Community Input on the Framework

- The Council will have an opportunity to consider the feedback received from the community on the Strategic Plan Framework

Agenda Item Outcome: Ensure an understanding of community priorities as reflected in the stakeholder outreach

Mission and Values

- Staff will spend time refining a draft mission statement and organizational values for discussion with the Council

Agenda Item Outcome: Provide guidance on the organization's mission and values

Priorities

- Identify priorities within the agreed upon Critical Success Factors

Agenda Item Outcome: Establish priorities to guide the efforts of the organization for the next 12 to 24 months

Adjourn for the Day

Day Two – Saturday, June 15th 8:30 am – Noon

The Strategic Planning Framework

- Vision - Does the Vision accurately reflect the future imagined by this City Council and the community?
- Mission and Values - Do the Mission and Values provide appropriate guidance to the organization?
- Critical Success Factors – Do these Critical Success Factors accurately reflect must go well in order for Lee's Summit to be successful in the future?

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