

WORK SESSION TOPICS  
MARCH 11, 2019

1. Work Sessions and Priority Setting: (90 minutes)

**A. Get to know/set expectations**

Goal: Members of the City Commission get to know each other and agree upon expectations for an effective group

Potential Questions:

1. Self-Introduction
2. Discuss Mutual Expectations

**B. Work Session scheduling**

Goal: Agree upon work session timing and format

Potential Questions:

1. When to have work sessions?
  - a. On a non-City Commission evening?
  - b. Before a regularly scheduled City Commission meeting?
  - c. At the end of a regularly scheduled City Commission meeting?
  - d. Other?
2. What is the preferred/maximum length of time for work sessions?
3. What is the preferred format for effective discussion of topics in work session?

**C. Setting priorities for work session topics**

Goal: Agree upon what topics/issues are of priority so we can prepare for and schedule work session discussions

Attachments:

- ✓ Timing of items that typically occur or already know need discussion
- ✓ List of items that have been carried from 2018 or mentioned already in 2019

Potential Questions:

1. What additional items should be on the list for consideration?
2. How do you want to prioritize the list? (recognizing there is not enough time to cover them all)

## **D. 2020 Goal setting discussion**

Goal: Staff needs direction regarding larger/long-term goals the City Commission has for the City as we begin developing the 2020 budget recommendation in May.

### Attachments:

- ✓ Results of the most recent Doodle Poll regarding availability
- ✓ Proposals received from two potential facilitators

### Potential Questions:

1. Can agreement be reached on a date/time to dedicate a block of time when all Commissioners are available to participate in a special meeting (please bring calendars)?
2. What feedback/input do you have for the Mayor and Vice Mayor regarding hiring of a facilitator to assist with the special meeting?

**DRAFT SCHEDULE OF TYPICAL ITEMS OR ITEMS ALREADY KNOW ABOUT  
(ASSUMING WORK SESSIONS ON REGULAR SCHEDULED MEETING DATES)**

<b>Date</b>	<b>Work Session Topic</b>
March 25	
April 8	Many Commissioners requested no work session
April 22	Capital Improvement Plan
May 13	Sidewalk Snow Removal Report
May 28	Capital Improvement Plan
June 10	
June 24	
July 8	
July 22	
August 12	
August 26	
September 9	
September 23	
October 14	Operating Budget
October 28	Operating Budget
November 11	Operating Budget
November 25	
December 9	None usually scheduled
December 16	Meeting hopefully will be cancelled

## OTHER POTENTIAL WORK SESSION TOPICS

### Potential Items

1. 2020 Goal Setting (if no special meeting)
2. Charter amendment for Mayor election
3. Tax abatement requests for 410 W. Broadway
4. Joint Water Study results
5. Recreational Marijuana Facilities
6. Potential Master Plan discussion topics
7. Discussion on 2019 major goals
8. Medical Marijuana Ordinance review

### Anticipated Potential Timing

- March/April  
May?  
Sometime May-July?  
Summer  
Summer  
Late Summer  
Summer to Fall  
End of year

### Potential Items – timing unknown

9. Purchasing Policy changes
10. Property Maintenance Ordinance
11. Solutions to barriers for infill development
12. Recreation Authority for aquatic center
13. Conference Room E renovation options
14. Policy issues follow-up from OMA/FOIA Training
  - Committee meetings –posting and minutes
  - Confidential legal opinion distribution
  - Commission group from emails
15. Bike/vehicle and pedestrian/vehicle accident data
16. Self-defense classes-various questions related to potential of offering

### Items carried from 2018 pending report that were never prioritized

17. Rental Housing-additional inspections (mechanical, electrical and plumbing) for converted units
18. Building inspection – coordination of inspections with County
19. Dumpsters located in paved alleys
20. Indian Pines south entrance
21. Non-motorized plan-priority policies to focus on in 2018
22. Potential ordinance change for single day trash pickup by neighborhood
23. Effectiveness of storm water ordinance-(Note: Still working with partners county-wide on stormwater matters)
24. Police statistics –desired outcomes and uses
25. Rental Housing Inspections: frequency based on good inspections
26. Sustainability goals
27. Incentives/strategy for owner-occupied conversions
28. Homeowner loan and emergency program-needs to be coordinated with above topic
29. Mt. Pleasant Center preferred development
30. Community Pool-Waiting to discuss at Intergovernmental Liaison meeting

# Poll "City Commission Goal Setting"

<https://doodle.com/poll/cpkabyf5hgabh4tf>

March 2019															
	Thu 21		Fri 22			Sat 23			Mon 25		Tue 26			Wed 27	
	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM	5:00 PM - 9:00 PM	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM	5:00 PM - 9:00 PM	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM	5:00 PM - 9:00 PM	8:00 AM - 12:00 PM	12:00 PM - 5:00 PM
Amy						OK	OK	OK							
Kathy	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Tony	OK	OK	OK	OK	OK				OK	OK	OK	OK	OK	OK	OK
Will	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Lori					OK	OK	OK	OK					OK		
Petro					OK			OK					OK		
Kristin	OK	OK			OK	OK	OK	OK			OK	OK	OK		
Count	4:0:3	4:0:3	3:0:4	3:0:4	6:0:1	5:0:2	5:0:2	6:0:1	3:0:4	3:0:4	4:0:3	4:0:3	6:0:1	3:0:4	3:0:4

	March 2019										April 2019				
	Wed 27	Thu 28			Fri 29			Sat 30			Mon 1			Wed 3	
	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM
Amy								OK	OK	OK					
Kathy	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Tony	OK	OK	OK	OK	OK	OK	OK				OK	OK	OK	(OK)	
Will	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Lori	OK			OK			OK	OK	OK						
Petro	OK			OK			OK		OK			OK	OK		OK
Kristin	OK	OK	OK	OK				OK	OK	OK			OK		
Count	6:0:1	4:0:3	4:0:3	6:0:1	3:0:4	3:0:4	5:0:2	5:0:2	6:0:1	4:0:3	3:0:4	4:0:3	5:0:2	2:1:4	3:0:4

April 2019															
	Wed 3	Thu 4			Mon 15			Wed 17			Thu 18			Fri 19	
	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM
Amy															
Kathy	OK	OK	OK		OK	OK	OK	OK	OK	OK	OK	OK	OK		
Tony		OK	OK	OK	OK	OK	OK	(OK)			OK	OK	OK	OK	OK
Will	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK	OK
Lori	OK			OK						OK			OK		
Petro	OK			OK			OK			OK			OK		
Kristin		OK	OK	OK			OK			OK	OK	OK	(OK)		
Count	4:0:3	4:0:3	4:0:3	5:0:2	3:0:4	3:0:4	5:0:2	2:1:4	2:0:5	5:0:2	4:0:3	4:0:3	5:1:1	2:0:5	2:0:5

April 2019				
	Fri 19	Sat 20		
	5:00 PM – 9:00 PM	8:00 AM – 12:00 PM	12:00 PM – 5:00 PM	5:00 PM – 9:00 PM
Amy		OK	OK	OK
Kathy				
Tony	OK			
Will	OK	OK	OK	OK
Lori	OK	OK	OK	OK
Petro	OK			
Kristin	OK			OK
Count	5:0:2	3:0:4	3:0:4	4:0:3



## **City of Mt. Pleasant City Commission: Proposal for 2020 Goal Setting Process**

**Purpose:** To assist the Mayor, City Commission, City Manager and Senior Staff of the City of Mt. Pleasant in establishing workable goals and objectives for 2020. The process allows the Mayor, Vice Mayor, and City manager not to be burdened with the jobs of leading and facilitating the discussion.

### **Two Suggested Approaches**

There are never guarantees that any approach to goal setting will produce desired results. Many variables can impact the process. Factors such as unanimity-or lack of-can impact outcomes. Whether participants wish to disagree at length or move past differing views can also affect workshop times. In any case, the job of the facilitator is to serve as an expeditor of time, ensure that all opinions are heard and when possible, help the group reach consensus. In the final analysis, members of the leadership team will determine whether they can reach consensus in the time allotted. The following two options are estimates of the time required to develop 2020 goals:

**Minimum option: Proposed with prior understandings with the team established by Mayor, Vice Mayor and City Manager**

**Four Hour Session with Elected and Appointed Leadership Team.**

Agenda/Process: Participants include Mayor, Commissioners, Manager and Senior Staff

- Welcome and Introductions and brief review of shared understandings of the process (Mayor/Manager).
- Plenary discussion regarding challenges/opportunities and other observations.
- The plenary continues with Commissioners identifying one or two of their top interests for the year.
- Breakouts (after one hour) two groups with Mayor and Manager moving between the groups. Focus top 3 to 4 goals that could be accomplished in 2020. Staff serves as resources to the discussion-not contributors.
- Plenary group discussion compares and discusses breakout group results. Identify goal areas of consensus and key objectives. Also, identify areas which the Commission may need to discuss at further length.
- Closing Comments.

### **Workshop Follow up:**

- Notes from the workshop will be developed by the Facilitator and sent to the City Manager.
- The City Manager and her team will work through the goal areas and objectives with a focus on creating Goals and Objectives that can be completed.
- The manager will submit the final proposed Goals and Objectives to the Commission for adoption.

### **Possible March/April 2019 dates for this option with Dr. Bender:**

- Monday, March 25. 5:00 to 9:00 pm
- Friday, March 22. 5:00 to 9:00 pm
- Monday, April 22. 5:00 to 9:00 pm
- Friday, April 19 (Good Friday) 5:00 to 9:00

### **Cost:**

The total price for this option is \$ 2500. If overnight lodging is required (April 22) and an additional cost of approximately \$100 will apply.

## **Preferred Option.**

**Two four-hour sessions involving an evening and a morning.** Probably a Friday evening-Saturday morning combination.

### **Friday Evening 5:00 to 9:00 pm**

Participants: Mayor, Commissioners, and Manager

#### **Agenda/Process:**

- Welcome and Introductions (Mayor/Manager)
- Plenary discussion regarding challenges/opportunities and other observations.
- Plenary continues with Commissioners identifying one or two of their top interests for the year.
- Breakouts (after one hour) two groups with Mayor and Manager moving between the groups. Focus top 3 to 4 goals that could be accomplished in 2020.
- Plenary Group Discussion compare and discuss breakout group results. Identify goal areas of consensus. Also, identify areas which the Commission may need to discuss at further length

### **Saturday Morning 8:00 to Noon**

Participants: Mayor, Commissioners, Manager and Senior Staff

#### **Agenda/Process:**

- Welcome and Introductions (Mayor and Manager)
- Plenary discussion, Commissioners discuss the Goals with the Department Heads.
- Commissioners and Department Heads breakout in groups focusing on each Goal Area. The groups identify what can be accomplished in 2020 in each Goal Area.
- Plenary discussion, each breakout group discusses their findings. Commissioners respond to each group.
- Closing comments.

This agenda and process is similar to the minimum option except for two key things:

1. It permits more flexibility for discussion by the Commissioners.
2. Ownership. The Goals are clearly those of the Commission.

#### **Workshop Follow up:**

- Notes from the workshop will be developed by the Facilitator and sent to the City Manager.
- The City manager and her team will work through the goal areas and objectives with a focus on creating Goals and Objectives that can be completed.
- The manager will submit a final proposed set of Goals and Objectives to the Commission for adoption.

#### **Possible March/April 2019 dates for this option with Dr. Bender:**

- **Friday-Saturday, March 22-23, 2019**
- **Friday-Saturday, April 19-20, 2019**

#### **Cost:**

The cost of the preferred option is \$5,100. Which includes facilitation, follow up notes and one night's lodging.

**Facilitator: Lewis G. Bender, Ph.D.**

Dr. Lewis Bender is Professor Emeritus at Southern Illinois University Edwardsville. Lew has researched and taught a wide variety of courses related to management and supervision. His primary research focus has been on organizational teams and the myriad factors and variables that impact team processes and effectiveness.

He is a specialist in helping teams and organizations to become more effective and efficient. He is currently conducting seminars and workshops for leadership and operational teams across the U.S. and Canada.

Dr. Bender received his Ph.D. from the University of Georgia (1977) his Masters degree from Wayne State University (1973) and his baccalaureate from Grand Valley State University (1971).

**References:** Available upon request.

**Attachment: Previous Strategic Planning Experience:**

Respectfully submitted:

Lewis G. Bender, Ph.D.

[www.lewbender.com](http://www.lewbender.com)

[lewbender@aol.com](mailto:lewbender@aol.com)

POB 330 LeRoy, MI 49655

618-792-6103

**February 18, 2019**

**Attachment I: Previous Strategic Planning and Team Building Experience:  
(Does not include training experience.)**

- Winter 2019- City of Plymouth, Michigan
- Winter 2019 – Huron Clinton Metro Parks
- Winter 2019 – City of Marshall, Michigan
- Winter 2019 – City of Saline, Michigan
- Winter 2019 – City of Coldwater, Michigan
- Winter 2019 – City of Clare Police Department, Michigan
- Winter 2019 – City of Big Rapids, Michigan
- Winter 2019 – City of Owosso, Michigan
- Winter 2019 – City of Lowell, Michigan
- Winter 2019 – Muskegon County Board of Commissioners
- Winter 2019 – City of Tarpon Springs, Florida
- Fall 2018 – Canton Township, Michigan
- Fall 2018 – City of Joliet, Department of Utilities, Illinois
- Fall 2018 – Highland Park Police Department, Illinois
- Fall 2018 – Village of East Dundee, Illinois
- Fall 2018 – County Road Association Self Insurance Fund, Michigan
- Fall 2018 – Clare Michigan Police Department, Michigan
- Fall 2018 – Antrim County Road Commission, Michigan
- Summer 2018 – Village of Carol Stream, Illinois
- Summer 2018 – City of Tarpon Springs, Florida
- Summer 2018 – City of Owosso, Michigan
- Summer 2018 – Lake County, Michigan
- Summer 2018 – Huron Clinton Metro Parks, Michigan
- Summer 2018 – Leon County Sheriff’s Department, Tallahassee Florida
- Spring 2018 – Van Buren County Road Commission, Michigan
- Spring 2018 – Carol Stream, Illinois
- Spring 2018 – City of Highland Park, Illinois
- Spring 2018 – Traverse City Light and Power, Michigan
- Spring 2018 - City of Fenton, Michigan
- Spring 2018 – Sanilac County Road Commission, Michigan
- Spring 2018 – City of Lowell, Michigan
- Spring 2018 – Village of Oswego, Illinois
- Spring 2018 – Highland Park, Illinois
- Spring 2018 – Roscommon Michigan
- Spring 2018 – Lake County Sheriff’s Department, Illinois
- Winter 2017 and Winter 2018 – Marquette County Housing Commission, Michigan
- Winter 2018 – City of Plymouth, Michigan
- Winter 2018 – City of Big Rapids, Michigan
- Winter 2018 – Canton Township, Michigan
- Winter 2018 - Summer 2017, Fall 2015 –Tarpon Springs Police Department, Florida
- Fall 2017, Summer 2016 – Sanilac County Sheriff Department Command Team
- Spring 2017 – Delhi Township, Michigan
- Spring 2017 – Muskegon County, Michigan
- Winter 2017 – City of Lowell, Michigan

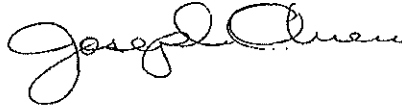
- Winter 2017 – Delta County Library, Michigan
- Winter 2016 - Village of Oswego, Illinois
- Winter 2016 – City of Delevan Police Department, Wisconsin
- Winter 2016 – Carol Stream, Illinois
- Winter 2016 – Village of Arlington Heights, Illinois
- Winter 2016 – Great Lakes Casting, Ludington, Michigan
- Winter 2016 – Traverse City Light and Power, Traverse City, Michigan
- Fall 2016 -Hartland Township, Hartland, Michigan
- Fall 2016 – Hudsonville, Michigan
- Fall 2016 – Mecosta County Sheriff Command Team
- Fall 2016 – Delta County Road Commission
- Summer 2016 – Mid Michigan Community College Leadership Team
- Spring 2016 – Village of Algonquin, Illinois
- Spring 2016 – Village of Plainfield, Illinois
- Spring 2016 - Michigan Academy of Family Physicians Foundation
- Spring 2016 – City of Davison, Michigan
- Spring 2016 – Monroe County Library, Michigan
- Winter 2015 - Grand Ledge Michigan
- Winter 2015 - Lake County Illinois Sheriff's Department of Corrections
- Winter 2015 - Michigan Association of Drain Commissioners
- Winter 2015 - Caledonia Township, Michigan
- Fall 2015 – Apple Canyon Property Owners Association, Illinois
- Fall 2015 – City of Marshall Michigan
- Summer 2015 – Lake County Illinois, Sheriff Department
- Summer 2015 - City of Marquette Housing Authority, Marquette, Michigan
- Spring 2015 - Van Buren County Board, Michigan
- Spring 2015 - St. Louis County Police Department, Missouri
- Fall 2014, Fall 2015 City of Saline, Michigan
- Fall 2014, Fall 2015 City of Fenton, Michigan
- Summer 2014 Woodlands Library Cooperative
- Winter 2014 Antrim County Road Commission, Michigan
- Winter 2014 Engineering Enterprises Incorporated, Chicago, Illinois
- Spring 2014 City of Portage, Michigan
- Winter 2013 Dewitt Charter Township, Michigan
- Spring 2013 Van Buren County Board, Michigan
- Spring 2013 Kalamazoo County Board, Michigan
- Spring 2013 Clinton County Board, Michigan
- Summer 2013 – Present - Village of Plainfield, Illinois
- Summer 2013 City of O'Fallon, Illinois
- Fall 2013 County Road Association Self Insurance Fund, Michigan
- Spring 2012 City of Fenton, Michigan
- Spring 2012 Michigan Chapter, American Public Works Association
- Fall 2012 City of Grand Blanc, Michigan
- Fall, 2012, Michigan Government Finance Officers Association
- Spring 2011 Cascade Charter Township, Michigan
- Spring 2011 City of Marshall, Michigan

- Spring 2011 City of Cedar Springs, Michigan
- Summer 2011 Village of Geneva, Illinois
- Fall 2011 Gaines Charter Township, Michigan
- Winter 2010, Spring 2015, Spring 2014-Grand Valley Metropolitan Council, Grand Rapids, Michigan
- Winter 2010-City of Walker Michigan, Walker, Michigan
- Spring 2010-Oakway Fire Consortium, Birmingham, Michigan
- Summer 2010, Summer 2013-Michigan Municipal Treasurers Association
- November 2009-Southern Illinois Law Enforcement Commission, Belleville, Illinois
- Fall 2009-Barrington Area Council of Government, Barrington, Illinois
- Fall 2009-Michigan Chapter of the American Public Works Association, Mt. Pleasant, Michigan
- Fall 2009, Fall 2012-Village of Wauconda Police Department, Illinois
- Summer 2009 – 2015 -Michigan Association of Municipal Clerks
- April 2009-City of Midland, Midland, Michigan
- January 2008-City of Fenton, Fenton, Michigan
- August 2008-City of Fenton Downtown Development Authority, Fenton, Michigan
- Summer 2007-Village of Barrington, Barrington, Illinois
- Summer 2007-City of Cadillac Management Team, Cadillac, Michigan
- Summer 2007-Homeland Security Region III, Bay City, Michigan
- Summer 2007-Homeland Security Region I, Lansing Michigan
- Spring 2007-Mid Michigan Community College Board of Trustees, Harrison, Michigan
- Winter 2005 – City of Alma, Michigan
- Winter 2004, 2005, 2006, 2009 – Summit Pointe Community Mental Health System, Battle Creek, Michigan
- Winter-Spring 2006-Alumni Association of Southern Illinois University, Carbondale, Illinois
- Winter 2006 – City of Maplewood, Missouri
- Fall 2005 – Chamber of Commerce of Maplewood, Missouri
- Fall 2005 – Illinois Network of Child Care and Resource Referral Association, Bloomington, Illinois
- Spring 2004 – Big Brothers and Big sisters of Sangamon county, Springfield, Illinois
- Winter 2006 – Board of Trustees, Mid Michigan Community College, Harrison, Michigan
- Winter 2006 – Village of Vernon Hills Police Department, Vernon Hills, Illinois
- Spring-Summer 2000 – Winter 2004 Michigan Commission on Law Enforcement Standards Board, Staff Strategic Plan Facilitation, Lansing, Michigan
- Winter 2002/Spring 2004 Strategic Planning and Team Development for Iroquois Memorial Hospital, Watseka, Illinois
- Fall 2000/2001 Cadillac Police Department Strategic Goals Workshop, Cadillac, Michigan
- Spring 2001, Council-Manager Planning Workshop, City of Mt. Pleasant, Michigan
- Fall 2000, City of Sandusky, Council Manager Retreat
- Summer 2000, Riverside Memorial Hospital, Door County, Wisconsin
- Spring 2000, American Public Works Association, Illinois Chapter , Springfield, Illinois
- Spring – Fall 2000/Fall 2001, Bay County Management Information System, Bay County, Michigan
- Spring 2000, Iroquois Memorial Hospital Board, Chicago, Illinois
- Spring 2000, Police Corps of Western Illinois University Winter 2000, Southern Illinois Law Enforcement Commission, Strategic Direction for Officer Training, Belleville, Illinois
- Winter 2000/Winter2001, Madison County Community Development “Continuum of Care 2000” – Homeless Strategy for Madison County, Illinois

## MEMO

February 20, 2019

TO: Nancy Ridley, City Manager, Mt. Pleasant  
FROM: Dr. Joe Ohren



RE: Proposed Team Building and Goal Setting Options

Nancy, thanks for getting back to me, and I hope you had an enjoyable vacation. Our family up in Glen Arbor is in the process of moving downstate by mid-March after 27 years--he is 91 and my wife's sister is 81--and we have tried to provide as much support as we can. Hence, the multiple visits along 127 through Mt. Pleasant recently.

I fully appreciate the challenges that local officials face in considering this kind of program; it costs a good bit of money, it takes a good bit of time, and the payoff is not always obvious (it sounds a good bit like my teaching career, I must confess). Let me spell out what the options are and suggest some alternatives in terms of costs. As I have indicated in the past, in retirement I am more flexible in terms of accommodating the needs of your governing body and leadership team, and at the same time less likely to be pushing really hard to secure contracts.

### **The Goal-setting Process**

I want to be very clear up front; what I am proposing is not strategic planning in the traditional sense of that term. Indeed, strategic planning, or visioning as it is sometimes called, tends to have a long-term perspective, engages a broader cross-section of the community, and at times is coupled with Master Plan updates or CIP process updates.

What I am proposing, and what I have facilitated with many communities across the state and region over thirty-five years, is narrower in scope and time frame. It is designed to generate an action plan for the next two to three years to guide decision-making by the governing board and leadership team. And, as you have suggested, I encourage the governing board to work with the key administrative staff--manager's office and department heads--to participate in the process. The focus is on developing an action plan to guide decision-making over the next two to three years.

The ideal program from my perspective involves four three-hour segments, each described in more detail below. Each segment corresponds to one of the objectives identified below:

1. Examine participant perspectives on the process by which we make decisions for the city and identify any specific recommendations for strengthening that process;
2. Identify the critical or strategic challenges facing the city over the next two to three years;
3. Based on the effort above, identify goals and action strategies in the form of a draft Action Plan to guide decisions in the near term to address those challenges;
4. Review the Draft Action Plan that emerges, and more importantly, set priorities for actions for each goal.

The product of segment one often suggests different approaches or recommendations on how we operate, how we share information, and generally involve the staff in the board's decision-making. Segments two and three are best done together; the discussion of critical issues often provokes thinking about what we might do to address them. Thus, a Saturday session works best, from about 8:30 to 4:30, obviously adjourning when we finish with our work,

The outcome of segment three is a draft Action Plan, with goals and action strategies spelled out in plan format. After the priority setting process in segment four, city staff normally develop timelines and metrics for assessing progress on accomplishment of items in the plan.

I am very much aware that this is a **big gulp** for elected officials! They often meet twice a month and serve as liaisons on other commissions or boards meeting once a month. To take on another obligation is not easy. But, especially early in the tenure of new members of the governing board, and especially when multiple new members have joined the governing board, I believe it is timely to spend the time to consider how we will make decisions, and what is most important to us over the next two to three years.

### **Strengthening Decision-Making**

The opening session is devoted to decision-making issues; to systematically and explicitly discuss "how" we make decisions for the city. I provide a brief homework exercise (attached to this proposal) to be completed by members of the council and the leadership team in advance of the session. Responses to the survey are transcribed, assembled and reported to participants at the session to stimulate analysis and discussion of the decision-making process.

As the survey suggests, the intent is to address explicitly what might be perceived as any *barriers* inhibiting or limiting the decision-making process, and then to identify what might be done to *strengthen information sharing, communication and decision-making*. During the discussion we also would spend some time talking about the roles and relationships between the several decision-makers in the city—mayor, commission members, manager, clerk, members of boards and commissions, and others.

The first work session is designed to enhance the governing board's capacity for decision-making and not to "make" people agree with one another. Indeed, my role is not to "tell" board members, the mayor, and administrative leaders what the problems are and how to solve them. I don't even assume there are problems, but rather start with the premise that no matter how effective we are as a decision-making body there is always room for improvement.

My job in this program is to assist the group in the decision process, not make decisions for the community. I use my understanding of local government and my process skills to structure a program that will allow the collective leadership to deal with problems and to make decisions in a productive and effective fashion.

The discussion will be summarized in written form after the session and presented back to the leadership group, essentially providing a record of possible actions that might be taken to improve decision-making.



### **Critical or Strategic Issues and an Action Plan**

Following that first session, the second homework exercise (the second part of the handout attached) is designed to stimulate thinking about the most critical issues facing the city as we look ahead. The intent is to generate a list of issues by brainstorming, and then shorten the list to focus on those that are deemed by the group as “most critical,” requiring action within the next two to three years.

Those priority issues essentially become the basis for goals—addressing the most critical challenges facing the city—and they then become the focus of thinking about action strategies. We again use a two-step process; what possible strategies might be implemented to address those critical issues and achieve our goals, and then we identify those deemed most important. As this suggests, a day-long session provides the continuity in discussion necessary for drafting an action Plan; a set of goals and action strategies related to each that provide guidance to decision-making by the leadership group.

### **Reviewing the Draft and Setting Priorities**

The final session provides an opportunity to review the work done thus far: the bullet points below suggest an agenda for the final segment of the program.

- Reacting to and reflecting on the notes and action plan;
- Clarifying the language of the goals used in the draft action plan;
- Adding to or amending the language of the action strategies in the draft; and
- Setting priorities for action strategies for each of the goals in the draft.

The final segment of the program, most importantly, provides an opportunity to determine priorities for action; we don't have the resources to do everything, so we need to identify those action strategies for each goal that are most important, highest priority. As I mentioned earlier, following this effort the administration often develops timelines and metrics for assessing progress on the action strategies identified in the Plan.

### **Final Report**

Following our work together I will prepare a full report including the products of all our work together and a set of my own recommendations for next steps in the goal-setting process based on my work with numerous community leadership groups over the past thirty-plus years. This is typically presented in writing although in some cases I have been asked to present the final report in person. This obviously also increases the cost of the proposal.

### **Cost**

A simple approach to consider the cost of my work is to estimate \$1,000 for each of the four segments I have described, without considering travel time and costs. You could focus on segment two and three, the critical segments for most communities, and scheduling the two on a single day, a Saturday, minimizes additional costs associated with travel. We could schedule one or more of the sessions on evenings, although that increases my costs for travel and overnight accommodations by \$200 per night.

The most efficient arrangement would be for me to come in on a Friday afternoon for segment one that evening, and then stay for segment two and three on Saturday. I would return to Ann Arbor that evening. Two or three weeks later I would return, after sending a written report in advance for review and reaction, for an evening session, again with an overnight stay. That approach would cost \$4,000 plus two nights of travel and accommodations at \$200 per night.

If you want to focus on segment two and three on a Saturday, that involves one night of travel and accommodation at \$200 plus \$2,000 for the daylong session. We could split those two sessions into two evenings, although increases my travel time and costs of accommodations.

In conducting such a program, the city would be responsible for arranging facilities and logistical support for the sessions, distributing all materials in advance for the sessions, and providing refreshments and meals for participants, as necessary.

The work would be done under a personal services agreement, with this proposal serving as scope of work; I would bill the city upon conclusion of the program.

**Conclusion**

I hope this helps you as you continue planning for a goal-setting workshop. Please don't hesitate to contact me if you have any questions about the proposal. I trust that I have been clear in presenting the options as you requested, and if not, don't hesitate to contact me.

Best wishes to you and your colleagues.

Attachment (separate file)—Survey Instrument

## City of Mt. Pleasant

### PLANNING AND GOAL-SETTING RETREAT A SELF-ASSESSMENT INSTRUMENT

Dr. Joe Ohren

#### ASSESSING WORKING RELATIONS AND DECISION-MAKING

In preparation for the opening segment of our planning session, please complete questions A through C on the attached survey instrument in the space provided about barriers to effective decision-making and strategies for overcoming those barriers. Be honest and straightforward in answering the questions; I don't assume there are problems but rather start with the premise that no matter how effective we are as a decision-making body there is always room for improvement. I will assemble and transcribe your responses for distribution at the session.

#### GOAL SETTING EXERCISE

During the second segment of our retreat session, we will focus on "where we want to go" (goals/objectives) as a city. To get there we need to begin by identifying the critical strategic issues facing us and then we can determine how we want to get there (action plan). Please complete questions D and E on the attached instrument. I will assemble your responses for our session together. At that time, we will discuss your perceptions of the most important or **strategic** issues facing the city in the months ahead, and ultimately define appropriate goals and action strategies.

Please respond to the survey no later than ..... As you can see from the contact information below, email your responses (this is preferable—just put Mt. Pleasant in the subject line—and there is no need to repeat the questions, just number your responses appropriately), or you can mail the completed forms to me. I have also provided my cell phone number in the event you want to discuss the questions or your thoughts about the retreat further.

Dr. Joe Ohren  
588 Glendale Circle  
Ann Arbor, MI 48103  
Joe.Ohren@gmail.com  
734.546.0039

## An Icebreaker

**A. Characteristics of effective decision-making groups**--Based on your experience with this and other decision-making bodies, identify three characteristics of good or "effective" decision-making groups. You can probably think of more than three, but what do you think are the three most important?

1.

2.

3.

## Decision Processes

**B. Barriers to effective working relationships/decision-making**--Identify three barriers that you perceive are getting in the way or might get in the way of effective working relationships and decision-making here. You can probably think of more than three, but what do you think are the three most critical?

1.

2.

3.

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**C. Strategies for improving our effectiveness as a leadership team**--Identify three strategies for improving our effectiveness as a Commission and a leadership team. You can probably think of more than three, but what three would you recommend to your colleagues as most critical, perhaps to be implemented over the coming months?

1.

2.

3.

## **Action Planning**

### **D. Identifying Critical Issues/Challenges**

What three issues, problems or challenges facing Mt. Pleasant do you perceive as most important? Move beyond the process by which we make decisions and focus now on the problems we face as a city. Again, be as specific as possible.

1.

2.

3.

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### **E. Strategies for addressing those issues**

For each of the three critical issues you identified above, identify one or two strategies for addressing the issues. You can probably think of more than that, but which ones should be implemented as soon as possible?

1.

2.

3.

4.

5.