



Town of Atherton City Council Retreat on August 16, 2016

August 2016

Management
Partners



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Retreat Report

The Atherton City Council held a Special Meeting on August 16, 2016 at the Main House, Holbrook-Palmer Park, Atherton. The retreat was an opportunity for Council members to reflect on communication styles and roles and identify a draft set of norms that facilitate effective interactions.

Nancy Hetrick of Management Partners facilitated the retreat.

Retreat Objective and Agenda

Meeting Objective

Further strengthen the team by developing a greater understanding of communication styles, shared understanding of key roles, and agreement about Council norms.

Agenda

- Call to Order/Welcome by the Mayor
- Public Comment
- Communications Style Exercise
- Roles and Council Norms
- Wrap up and Closing Comments
- Adjourn

Workshop Ground Rules

At the start of the workshop, Council members affirmed workshop ground rules. They included:

- Seek consensus
- Everyone listens to each other, with respect and inquiry
- Everyone participates
- Disagree agreeably
- Focus on issues not the person
- Assume good intent

Workshop Participants

- Elizabeth Lewis, Mayor
- Michael Lempres, Vice-Mayor
- Rick DeGolia, Council Member
- Cary Wiest, Council Member
- George Rodericks, City Manager
- Theresa DellaSanta, Assistant to the City Manager/City Clerk

Council member Bill Widmer was absent (excused).

Communication Styles Exercise

To begin the retreat, Council members participated in a communication style exercise using the “What’s My Communication Style?” instrument published by HRDQ, a soft-skills experiential learning solutions developer. City Council members were guided through a series of activities where they identified their primary and secondary communication styles. The key to the styles is shown in Attachment A.

- Mayor Elizabeth Lewis: Primary is Spirited; secondary is tied between Direct and Considerate
- Council Member Michael Lempres: Primary and secondary are tied: Direct, Spirited
- Council Member Rick DeGolia: Primary is Spirited; secondary is Direct
- Councilmember Cary Weist: Primary and secondary are tied: Direct, Spirited
- City Manager George Rodericks: Primary is Direct; secondary is Systematic
- Assistant to the City Manager Theresa DellaSanta: Primary is Considerate; secondary is Systematic

| | |
|---|--|
| DIRECT Primary: George (CM) Tied Primary & Secondary: Michael, Cary Secondary (tied): Elizabeth | SPIRITED Primary: Elizabeth, Rick Tied Primary & Secondary: Michael, Cary |
| CONSIDERATE Primary: Theresa (ATCM) Secondary (tied): Elizabeth | SYSTEMATIC Secondary: George (CM), Theresa (ATCM) |

Participants drafted communication style statements to describe how they like to interact with other Council members and with City staff. Table 1 provides a summary of terms used to describe each participant’s style.

Table 1. Summary of Communication Style Statements

| Council Member | When I communicate, I like to... | When others communicate with me, I like them to... |
|---|--|---|
| Michael Lempres | Be respectful and careful with words; be convinced I’m understood | Be factual, concise, and accurate |
| Rick DeGolia | Think carefully about who I am communicating to and be as direct as is respectful | Ask what I think and express what they think without tempering their thoughts |
| Elizabeth Lewis | Try to make the other person feel comfortable; use humor; make sure they understand what I say | Feel I am listening and understand them |
| Cary Weist | Be clear | Be factual and get to the point |
| George Rodericks (City Manager) | Give feedback, lead to my perspective and solicit feedback | Give detail on the steps to their thinking, answer questions, get to the point. |
| Theresa DellaSanta (Assistant to the City Manager) | Be short and sweet | Be clear, concise and detailed |

The team discussed their individual communication preferences and shared observations. The result of the discussion was an increased understanding of each other’s styles and preferences and the themes listed below.

Discussion themes

- Focus on the facts – communicate what we know.
- Acknowledgement that rapidly dispersing information for transparency purposes can result in updates and corrections as information changes or becomes available.
- All appreciate receiving sufficient detail to feel knowledgeable and informed. This increases trust.
- Having background and description provided in staff reports keeps things transparent and allows everyone to be equally informed.
- Important to make corrections when information changes or mistakes occur (be clear about changes). Be factual. This also increases level of confidence and trust.

- For major projects take the approach of “Anticipate, plan, execute, and assess.” Approach each project as an opportunity to engage and learn.

Roles Discussion

The team discussed the roles of the Mayor, Council, City Manager and Advisory bodies. Summaries of the identified roles are shown in Tables 2 through 5.

Table 2. *Mayor’s Roles*

| Mayor’s Roles |
|---|
| Ceremonial role; no more than one vote; 1 st among equals |
| Facilitate effective meetings |
| Provide for even treatment of all Council members |
| City spokesperson; figurehead for events |
| Help each of us be heard, engaged |
| Control flow of discussion at meeting (both Council and public) |
| Work with the City Manager to finalize the Council meeting agenda order |

Table 3. *Council Members’ Roles*

| Council Members’ Roles |
|---|
| <i>Serve as policy makers, not day-to-day managers</i> |
| <i>Establish long- and short-term priorities (collectively)</i> |
| <i>Represent City, community</i> |
| <i>Be prepared and up to speed</i> |
| <i>Respond to community</i> |
| <i>Provide regional representation in alignment with Council policy</i> |
| <i>Make clear when we are responding as an individual as opposed to representing the City</i> |
| <i>Respect staff’s time constraints (30 minute rule)</i> |
| <i>Treat staff with respect</i> |
| <i>Has authority over the City Manager and City Attorney (collectively)</i> |

Table 4. City Manager's Roles

| City Manager's Roles |
|--|
| Accountable to Council |
| Run day-to-day operations |
| Hires/fires staff |
| Implement Council policy and priorities |
| Responsible for transparency and integrity of the organization |
| Be active and engaged in the community |
| Let Council know when he will be out of the office and who is in charge |
| Approval authority, but also share with Council what has been approved |
| Present himself to the community and the press in manner that reflects Council direction |
| Prepare Council agenda "look ahead"; keep Council informed about upcoming items |
| Develop staff; succession planning |

Table 5. Advisory Bodies' Roles

| Advisory Bodies' Roles |
|---|
| Act in an advisory capacity to the City Council |
| Abide by the committee charter; have a defined purpose |
| Focus attention on specific issues and problems within their area of responsibility |
| Gather, synthesize and analyze information relevant to their area of responsibility |
| Encourage public participation |
| Balance community desires with municipal responsibilities and resources |
| Subject to the provisions of the Brown Act |
| Serve at the pleasure of the City Council in a voluntary capacity |

Note: Each advisory body has an assigned Council member to serve as a liaison between the Council and committee (excluding the planning commission). The Council liaison has no voting powers on the committee. An alternate Council liaison attends in the absence of the appointed liaison.

Council Norms

The team identified several norms below that will aid in their effectiveness in working together.

- Show mutual respect
- Be trustworthy
- Assume good intent
- Listen with respect
- Seek clarification with both staff and colleagues
- Focus on the issue, not the person
- Disagree agreeably
- When debate is over and vote is taken, we move on
- Focus on the “now”
- Treat everyone equally

Communications with staff: Acceptable to communicate for informational purposes to department heads (but not below), in addition to going to the City Manager for information. The Council may not direct staff time. The City Manager may adjust a request based on the amount of time that would be required to gather the information. Council members copy the City Manager on all emails to staff.

Bike Rack and Evaluation

Ideas and action items that required more time than was available or were off agenda were captured on a flip chart called the “bike rack.” The following items emerged:

- Implement a practice of conducting *after action critiques* for significant projects, such as Marsh Road or the HAWK Beacon, to allow for continuous learning,
- Revisit “Colleagues Memo” policy, and
- Consider annual Council briefings for JPAs.

Council members were also asked what they liked and what they would change for future retreats.

What we liked

- Lunch
- The communications styles exercise and discussion
- Discussion regarding roles
- Discussion of Council norms
- Relaxed setting; open dialogue

What we would change

- Invite staff to participate for a portion of future sessions