

City of Cleveland Heights

City Council Retreat Report *(Executive Session)*

February 2017



The City of Cleveland Heights City Council and City Manager met at the Senior Activity Center, One Monticello Boulevard, February 5, 2017, to conduct a Council Retreat that was held in Executive Session. The retreat was facilitated by Julia Novak from The Novak Consulting Group.

Sunday, February 5

Councilmember Yasinow moved to enter into an Executive Session for the purpose of holding a Council Retreat; the motion was seconded by Councilmember Roe. The motion was unanimous.

Attending the Council Retreat were the following:

- Mayor Cheryl Stephens
- Vice Mayor Jason Stein
- Mary Dunbar
- Carol Roe
- Kahlil Seren
- Michael N. Ungar
- Melissa Yasinow
- Tanisha Briley, City Manager

Setting the Stage & Introductions

The retreat began with introductory comments by the facilitator who reviewed the objectives for the day and provided an overview of the agenda.

The objectives for the Council Planning Session included:

- Setting a foundation for the Council's resource guide/handbook
- Laying a foundation and articulating how the Council wants to work together – specifically outlining what the Council needs and wants from one another

The facilitator explained the importance of creating an environment that is safe for giving and receiving constructive feedback. The participants agreed to adhere to the retreat norms.

Intentions & Expectations

The Council was asked to think about their intentions for today's Planning Session. Specifically, to think about and reflect on these three questions:

- What do you hope we accomplish?
- How do you plan to participate?
- How do you want other people to experience you?

These reflections were private and not shared. Following that, the Council was asked to share their expectations for the day.

Mary – Pave way for faster action, increase collaboration, establish mutual respect.

Carol – Have a productive trusting relationship with City Manager and staff.

Melissa – Open dialogue of strengths, weaknesses, hopes, and concerns.

Tanisha – Clear protocols for communication, interactions, and general procedures for Council.

Michael – Roadmap for ongoing relationship with the City Manager and Council. Communication, collegiality, respect.

Jason – Create Council handbook; broad ideas versus specific. Guide for normal procedures.

Mayor Stephens – Focus on what the best things are for Cleveland Heights; establish more cohesive relations with City Council.

Kahlil – Create clear understanding of rules, roles, and process we use.

Governing Together

The Council had the opportunity to explore a series of questions on what it means to govern well as a body. The Council was asked to reflect on what good governance looks like to them. Specifically, the Council responded to questions ranging from defining their governing values to the type of relationships they hoped to have with their colleagues to how they distinguish between the role of policy and administration.

Mary – Good governance means making good decisions – delegating to committees, monitoring how decisions are made, to overseeing how decisions are made. The focus of Council should be strategic, not operational. The Council sets objectives and should determine how those decisions are to be paid for...everyone on the Council should have a chance to be heard. Exchanges should take place between the Council and staff along with community input. The Mayor serves as the Chair of the Council and is the spokesperson; the position supports good working relationships. In a nutshell – in good governance everyone can be heard...support participation and consensus. It is important that the Council, especially new Council members, receive training/orientation. The Mayor needs to be a leader; the position should not be given as a reward; the position should be given to the individual who is best suited for the role. The City Manager ensures that Council decisions are implemented in a timely manner and is responsible for the operations of the City. The Council is the decision maker; Council relies on the City Manager to provide accurate and timely information. Good governance ensures that all sides of an issue are reviewed. The City Manager and Mayor should meet with Councilmembers one-on-one when needed. Agenda items should include all relevant information such as recommendations, budget information, outside information, stakeholders, etc. Councilmembers should come to meetings prepared and comply with Ohio Conflict of Interest/Ethics laws. Council is responsible for overseeing the City's budget/finances – responsible for maintaining the Citizens confidence in the City...and should make good and ethical decisions for the City.

Carol – Recognize the importance of compromise and collaboration. Listen to varying opinions and make decisions that are best for the entire City; recognize the resources are not unlimited. Public needs to see and believe that the Council is deliberative and prepared for discussions. Important for the public to know that we start our meetings on time. Governing in the City is based on a philosophy of a love of diversity and for individuals and groups; and that we work actively to preserve that value.

We are respectful of the Charter and what it is about and we are open to and dialogue what needs to be changed. We have an active committee structure that is led by the Council members and we don't expect the Mayor to do all the work of the Council. We value treating everyone the same; treat people how you want to be treated; seek justice; evaluate benefits and risks. In terms of decision making, it is important to

not be smug or arrogant when your side wins and when you don't, you should still support the decision or be quiet and try to come to grips with it.

Question people but don't be condescending; don't surprise your colleagues in public. Collaborate with your colleagues, trust your colleagues/committees; let the committee structure function to make more efficient decisions. The relationship with administration should be collaborative and respectful – remember that the Council is accountable to the citizens; the Council's role is to evaluate the City Manager so there are no surprises.

The difference between administration/policy – how we allocate time on our agenda – formulate policy for big picture items. Ordinances should be enforceable, provide use with different options. Staff is responsible for providing best practices and implementation. We should be known for transparency, economic development, addressing housing concerns, and ensuring citizens know who they can go to with concerns.

Michael – By joining the Council I joined the nuclear “we” consisting of three teams. Team #1 is the team led by the Mayor and team #2 brings in the City's leadership which is led by the City Manager. I really want to see our team succeed. Team #3 expands to include the neighborhood and business communities. The work we do feeds the soul; it isn't for a paycheck. Collectively – we need to work well as a team, and move with a fair degree of fluidness and fluidity amongst those teams.

As soon as I got on the Council, I noticed a tension in how the Council was interacting with the City Manager. Good governance means we should have a good working, healthy relationship with our administration. It means we have their back and they have ours. Tanisha and her staff need to be mindful of helping us succeed and we need to help them succeed. I am a nervous nelly; I run scared, not confident. We are Cleveland Heights and we have several challenges and opportunities facing us that many suburbs do not and it is important to have rock solid working relationships, very stable form of government between city government and administration. We all took an oath to uphold our form of government; that's what we signed up for.

Melissa – Our values as the Council are important. They are our bedrock as well as the relationships you have with your Council members are important. Honesty, openness and collaboration. What we do is serious work, but we shouldn't take ourselves too seriously. I agree with the team analogy – want to see that buy-in. Work collaboratively with each other and staff. If you feel like you're on the team, but if others don't feel you're on the team, then you'll perceive that. You can agree without being disagreeable. I want this governing body to be known for that – when you are surrounded by affluent white neighbors, you can make mistakes and nobody notices; we don't have the luxuries and have a lot of challenges. How we work together and embody our values and work with our administration is very important. I want us to be known to be a community of no volatility.

Jason – Collaborate, compromise, and team – successful and efficient Council.

Kahlil – Good governance is the ability to articulate very clearly why you made the decisions you did – the idea that the decisions are evidence based and reflective of the values of the organization and clearly articulate why and how they connect to the goals/values of the organization. Best way to do that is through compromise, which is important. In context of Cleveland Heights, the participatory process is a useful tool. Residents let us know when they are displeased, whether as observers or participants. We

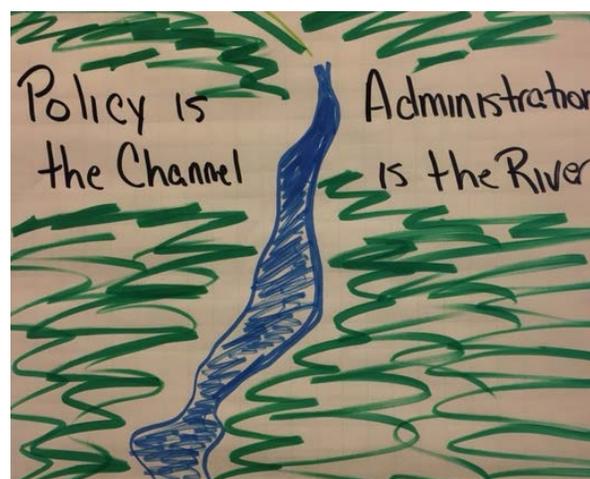
have to be able to show the benefits/the whys. We adhere to the laws and current law is what it is and we can make changes as a law-making body as needed.

Effectiveness – going back to what you want your outcomes to be and achieving them. Prioritizing our outcomes; putting our limited resources where we can maximize results and make the most impact. It is important to crowdsource some of our processes/questions because there is lot of information out in the community that we need to gather. Figure out what best practices are and how to achieve a goal outside this group of seven people. Participation and transparency – we are all accountable to the public. On a day to day basis, comments on social media let us know how individuals feel at a given time – is a piece of governance. People are paying more attention now than they used to.

It is important to remember that not all decisions are the perfect solution. There may be side effects that may be negative that you could not have anticipated. Should create a degree of humility – this should take the gloating of out winning. Know that most decisions are not always final.

In terms of relationships with the Council, I feel comfortable letting the Council know how I feel about an issue and what things could move me on an issue. More information on X or a more robust understanding of how our citizens feel. Here is how I could be moved, here is where I am rock solid; and I would hope you could talk to me in the same way. In terms of my relationship with administration, as one of seven, I don't unilaterally make any decisions but letting you know where I stand on things is important to me and fulfilling my role is important to me and knowing what our role is and an ongoing conversation and what our roles should be. None of this is written in stone, but it could change and adjust overtime – ways to be more effective overtime. Fluid.

The line between policy and administration can get blurry – policy can be very restrictive or it can be vague. Ultimately, policy is the channel and administration is the river. When the boundaries aren't as steep – ultimately how you craft policy can either be very restrictive or it can be vague. There needs to be an ongoing back and forth conversation between the bodies to find the best balance. I hope that this governing body would be known for being engaged and transparent and inviting participation from the public to augment our own skills. We work better – government works better – when the public pays attention. I want us to be known for enticing our citizens to pay attention.



Mayor Stephens – Today is about listening and learning and I hope to get each of us to interact. Government should evolve as the community needs it to – to meet its needs. It is important for us to reach out and communicate as needed (text, call, etc.). As we carve out time for each other, it helps us better interact as a team. When we are formally sitting down each Monday, there are members of the media present which can make it difficult. I want us to be known for enhancing the value of living in our community, that we worked together in such a way that people moved into our community, that people moved back to Cleveland Heights. Some of the investments and decisions we have to make are tough. There are no easy answers to some of these issues (sewer); but the most important thing is the interaction that has us listening to one another. The strength of each of the personalities on the Council means you are going to be strong, strong leaders, but always trying to remember what is best for the community no matter what, focusing on keeping the community together. How we interact, how we are willing to compromise, and lead together into the future.

Common Themes – Governing Together

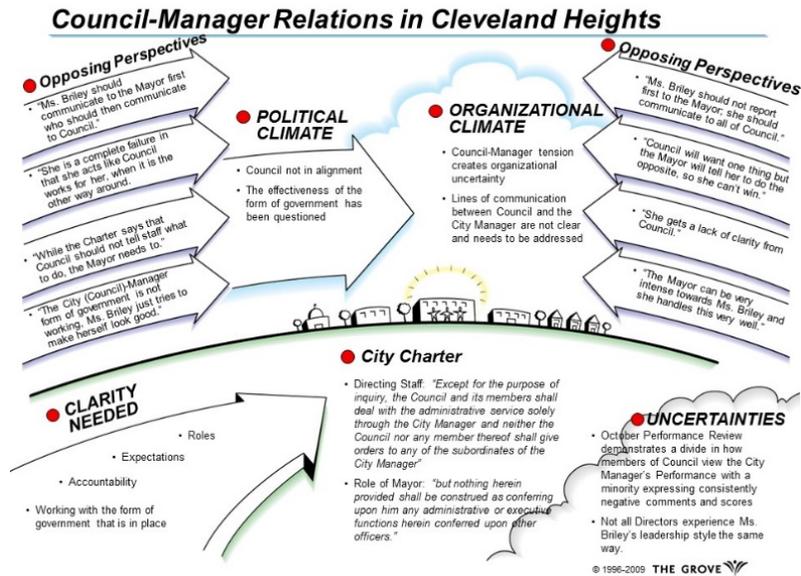
- Collaboration
- Compromise
- Engagement (staff, Council, public)
- Transparency
- Values – Actions
- Respect
- Support
- Honesty
- Pragmatic
- Humility
- Recognize lots of strong personalities
- Efficiency and Effectiveness
- Humor
- Evidence Based Decisions
- Why behind the What

Areas of Clarification

- Formal Training Orientation for new members on Council Norms, etc. – needs to be established, documented
 - City Manager has provided operational orientation, but there is no documentation for Council procedures, etc.
- Good policy provides guidance on the “what-ifs”
- Recognize that words don’t always mean the same things to different people (i.e. transparency)

Great Expectations

The Council had the opportunity to share their expectations for the Council (colleagues), the Mayor, and the City Manager as they govern together. The facilitator explained that based on initial conversations with the Council, there appears to be a lack of clarity and that the board is not in alignment. In addition, the organization and staff feel the tension. The Council was able to participate in a constructive conversation. The following graphic was shared with the group as reference.



Expectations for One Another

What do I Expect from my colleagues on the City Council?

- Meeting will begin on time for established meetings (any formal advertised meeting)
 - Work Sessions – 6:30 p.m. (everyone Monday)
 - Formal Council Meeting – 7:30 p.m. (every other Monday)
- Transparency – that I don't have to question motives – no hidden agendas*
- Let colleagues know where you stand on issues
- Interaction between colleagues is important – share your time and communicate (provide a heads-up)
- Come to the meeting having read the materials/be prepared – ask questions at the meeting instead of just asking staff to regurgitate the agenda materials
- Attend community events
- Provide leadership for prospective committees, vet issues to enhance efficiency
- Take seriously the responsibility of representing the City in all we do
- Give one another your full attention at meetings – whoever has floor (no interrupting, minimize electronic distractions, no side conversations)
- Stay focused on creating policy change that will enhance our community
- Presume competence and good intent on the part of my colleagues
- Treat your colleagues with professionalism and respect
- Respect and uphold the City Charter
- Hold one another accountable for meeting our agreed upon expectations

The City Council reached consent on all expectations except one:

- *Transparency – that I don't have question motives – no hidden agendas*

The Council had a conversation on the importance of holding one another accountable and how to handle a situation when they see a colleague step over the line. Example on how to handle the situation included:

- "I think we need to enter into executive session."
- "I don't think this is an appropriate conversation."

Expectations of the Mayor?

- Preside at our meetings – ensure debate and discussion is on target
- Mayor solicits/welcomes input from the council in establishing the Council meeting agenda
- Trust the committee chairs to do their work
 - Assign work/assignments to committees to vet before going to the full Council
- Communicate interactions with the community that impact the governance of the City*
- Be a stabilizing force for the organization and the community*
- Be the face of the City to the Community
- Fulfill the office of Mayor as defined in the City Charter
- Be collaborative with colleagues in establishing and communicating direction
- Respect and honor the role of the City Manager and the staff
- Condense and distill the conversations of the Council into action items for the City Manager
- Check-in with Council on issues before a meeting (intermediary role)
- Funnel communication from the City Manager to the Council

The Mayor agreed to all expectations except two:

- *Communicating interactions with the community that impact governance of the City*
- *Be a stabilizing force for the organization and the community*

There was considerable conversation that occurred when the group articulated the expectations. The following is a summary of the issues raised:

A concern was raised that while the body had decided in 2016 to not move forward with a Charter Review, the Mayor held a meeting in her home with community members to discuss changing the City's form of government (without notifying or involving other members of the Council).

The Mayor indicated that community members reached out to her, but after the first community meeting she had chosen to step away from the group. She expressed that she wants to do what is best for Cleveland Heights and believes that times change. In addition, she shared that she does not believe that the Council-Manager form of government is effective.

Members of the Council expressed that they felt that the Mayor had violated her role as Mayor to uphold the City Charter and that her lack of confidence in Council-Manager form of government is impacting their ability to work together as a team. Specifically, it was shared that her actions could be viewed as destabilizing; examples included when staff hear she is "gunning for their job" or community members are perceiving her actions as a "transparent power grab."

During the conversation, other thoughts and perspectives were shared as well:

- Simply reviewing the Charter is not destabilizing – it's the nature in how it's happening that's concerning.
- Largest issue is transparency with the meetings.
- If citizens are considering this, any of us can support it or not. The devil is in the details.
- Changing the form of government won't just make things better.
- There are forms of government that work well and some that don't work well.
- We must have the City Manager's back.
- If the Council has issues with how things are being managed, then the Charter allows us to handle that. It has mechanisms for performance. If you aren't happy with the individual – you don't get rid of the position. Instead we are talking about getting rid of the entire form of government – that's entirely different.
- It's destabilizing when the leader of the organization publicly says she doesn't respect or trust this form of government.
- If the Council wants to play a more active role in hiring the police and fire chiefs, that can be done via ordinance, not through changing the City Charter.
- It seems like it takes a long time to get things done. Can we make our form of government more effective, specifically in areas of economic development?

Most the time during this planning session was focused on Council and Mayor expectations. However, a few expectations were outlined and discussed for the City Manager and expectations the City Manager had for the Council. These expectations will be discussed in depth at a future retreat.

Expectations of the City Manager

- Check-in if you are unclear about the existence of consensus on direction.
- Provide responses to resident concerns for Council to share.
- Communicate with the body directly. Don't expect the Mayor to be the conduit unless specifically stated.

What does City Manager Expect of Council?

- When you have concerns about effectiveness, tell me. Don't wait for evaluation.
- Inquiry okay, direction is not when interacting with staff.
- When communicating with Department Heads, please cc City Manager.

Providing Policy Direction to the City Manager

In addition to expectations, the Council discussed providing policy direction to the City Manager.

A specific example was shared:

If the Mayor asks the City Manager to focus on a specific area in a public meeting, and no other member of the Council dissents, the City Manager views it as direction. However, if in the City Manager's review, he/she is criticized for focusing too much time on this specific issue, this causes a disconnect if the Council doesn't speak up or comment when the direction is given.

The Council had a discussion regarding giving the City Manager direction in a public setting. It is important to note, traditionally the Mayor or City Manager assumes that silence means consensus. The Council states that their silence does not always mean consensus. Sometimes they do not have all the facts and

are uncomfortable disagreeing in public. They stated that they could ask for more time to think about an issue and that they were comfortable with the City Manager asking for direction if it was unclear.

Closing/Next Steps

Today, the Council and Staff had an initial conversation which laid the foundation for how the Council and staff want to work together and their expectations for one another as a governing body. The Council asked to meet again with the facilitator to continue their dialogue.

As a follow-up to today's session, The Novak Consulting Group will provide the Council and staff with a draft Council Resource Guide for their review and comment.

During the Planning Session, other topics were raised that need further discussion and/or review by the Council and staff:

- Meeting Procedures
 - Roll Call Votes
 - Council Reports
 - Parliamentary Procedures
- Charter Review
- Agenda Setting
- Responsiveness
- Be more strategic in communications
 - specifically, with priorities of economic development – housing – image
- Drafting Legislation

Council and staff were asked to share their closing thoughts about the retreat.

Jason – Inclusive. Good discussion. Put some stuff out there. Good over the long-term. Commend everyone. Know it was uncomfortable, but know we are going to get stronger.

Melissa – Cleared the air. Reset the relationships of being honest and transparent. Working towards same goals and as a team, but we aren't done yet.

Tanisha – We're getting there, but not there yet. Wanted to listen to determine how to be a better resource professionally for Council.

Carol – Facilitate the Council having a trusting relationship with the City Manager and staff and feel like we got started. Think we may have had an ambitious agenda today, but have a plan going forward.

Mike – Agree with Jason about today, but those asterisks have my attention.

Khalil – Have a clearer understanding of goals and rules. Once we get to a point that our administrative code isn't so vague I'll be more satisfied. I think that we made progress today. I know that I can get caught up in the context and can move away from situations. I don't want to tell my competition my political strategies. If I have a political agenda, I wouldn't bring it to Council. Trying to balance my concerns and figure out my next move. If we operate with respect for each other, those asterisks are less worrisome than otherwise might be. Don't want to throw City into chaos.

Mary – Would like to see an agreement to have a Charter Review to pursue this issue and pave the way for reviewing the City’s tax base. Today was productive and look forward to doing even better than ever and moving forward and achieving our goals.

Mayor Stephens – I have never said anything but what’s best for Cleveland Heights. It is important for this group to interact cohesively. While I may have different perspectives, I listened to hear what other people on the Council have told me about the importance of being transparent. When I reach out and talk to each of you, I try to respect what is on each of your agendas and sometimes I need coaching too. We all have busy lives and careers. I do believe that we can accomplish more together and I do set aggressive agendas. I understand that we may have different opinions and respect your opinions.