



## CITY OF BEVERLY HILLS STAFF REPORT

**Meeting Date:** July 24, 2012

**To:** Honorable Mayor & City Council

**From:** Jeff Kolin, City Manager

**Subject:** Recommendation for a City Council Workshop and Team Building Session

**Attachments:** 1. City Council Retreat Facilitators Grid

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### **INTRODUCTION**

It is valuable for the City Council to devote time periodically to review its norms and procedures for communications and conducting meetings. The City Council Policy and Operations Manual was revised last in March of 2009. The manual serves as a guide on the role of the Mayor, Vice Mayor and members of the City Council as well as a variety of topics including legal matters, ethics, conduct of council meetings, the process for placing items on agendas, correspondence and a variety of other topics.

The City recently approved the Fiscal Year Budget for 2012 – 2013 which will serve as a resource allocation guide for the year. The City Council also meets annually to establish priorities for the upcoming fiscal year. These sessions have traditionally occurred in in November or December to establish priorities for the upcoming fiscal year starting the following July to allow them to be incorporated in the budget planning process.

It is valuable to devote time for a comprehensive review and discussion of these items periodically to evaluate their effectiveness and any desired changes.

### **DISCUSSION**

Staff has contacted four outside facilitators and asked them to provide proposals to conduct a one day City Council Workshop and Team Building session to include the five members of the City Council, the City Manager and City Attorney. Mayor Brien recommended that the proposal for a City Council Retreat be scheduled on a Study Session Agenda to allow discussion and questions by the City Council to determine if there was interest in scheduling a full or partial day session.

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A suggested format would include a full or  $\frac{3}{4}$  day retreat which could be followed by an evening dinner for the participants. Many cities choose to schedule these types of meetings on a weekend day to allow for public participation. Once it is determined that there is interest in conducting a workshop for the city council, staff would work with the Mayor to finalize a date where the entire council could attend and finalize a contract with a facilitator who would prepare the agenda for the session.

Based on the responses from the four individuals contacted by staff for facilitation services it is staff's recommendation to work with Management Partners, Jan Perkins, to develop an agenda and format for the workshop and select a date when all participants are available to attend.

**FISCAL IMPACT**

None.

**RECOMMENDATION**

It is recommended that the City Council provide direction to staff to proceed with the scheduling of a City Council workshop.

  
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Approved By

# **Attachment 1**

<b>City Council Retreat Facilitator</b>	<b>Management Partners</b>	<b>D &amp; R Consulting</b>	<b>Browning &amp; Associates</b>	<b>Don Maruska &amp; Company</b>
Type of Organization	Management Consulting	Professional Consulting	Professional Development Services	Strategic Support and Facilitation
Facilitator	Jan Perkins, Sr. Partner	Rita L. Geldert	Carla J. Browning, CEO/President	Don Maruska, MBA, JD, Master Certified Coach
Experience in Local Government	30 years	35 years		Facilitator of Councils and other public groups
Workshop Approach	Collaborative: Preparing for Council Workshop (Conducting interviews with City Manager, Mayor and Councilmembers, developing/reviewing an agenda, coordinating workshop logistics, facilitating Workshop, summarizing results and next steps to be taken)	Enhance personal relationships and dynamics of working together	Participants will increase their understanding of one another while determining a unified approach to communication and goal realization; participants will gain a new sense of appreciation for other viewpoints than their own while genuinely listening for understanding, and creatively coming up with win-win solutions.	Discuss interests and direction with Mayor and City Manager; interview Councilmembers by phone (or in person) to identify objectives, ways to optimize each member's contribution, and opportunities to enhance results for Council overall; summarize issues and opportunities to optimize effectiveness.
Workshop Goal	To enhance effectiveness of City Council and City Manager as a team.	Building a stronger teamwork among City Councilmembers and Management	Teambuilding Process to be facilitated	
Workshop Objectives	Engaging and interactive Workshop session with focus on the issues identified through interviews and the outcomes desired by the City Manager, Mayor and Councilmembers; participants will discuss their interests and reach agreement on follow-up actions to be taken	Gain consensus on City's strategic plan and vision; review, discuss, explain business of Government and how to be a successful government; build communications and teamwork; identify barriers that must be overcome to ensure good governance	Determining a shared set of values and expectations to honor when working with one another; clarifying a shared vision and primary mission; establishing a communication process that presents one voice with a unified focus and message; cultivating an environment of collaboration versus competition.	Clarify hopes that Councilmembers have for the City; identify how to tap the best from each Councilmember; examine critical issues for Council; discuss ways to tackle tough issues that honor diverse perspectives, reach superior decisions and build community; develop guidelines for civic culture.
Workshop Post-Retreat	To include a report summarizing results and follow-up steps to be taken.	To include a questionnaire to gauge participants' clarity on action plan for communication and teamwork, and feedback regarding retreat		Summarize results of key conclusions from Workshop, outline suggested next steps, especially ways to reinforce successes. Three-to-nine months later (Part IV), discuss update with Mayor and City Manager; solicit input from all Councilmembers on what's working and opportunities to reinforce and enhance results; review and discuss progress in a study session or other format; summarize results and recommendations for continued progress.
Experience as a City Manager	Yes	Yes, 14 years	No	No
Experience with multiple CA municipalities	Yes		Yes	40 CA Local Government Client Engagements
Experience as a Management Consultant	Yes		Yes, City of Beverly Hills Fire Dept., Community Development Dept.	Yes, extensive knowledge of best practices in local government as director of Cal-OICMA and SCMFO Coaching Programs (serving over 4,000 leaders in local govt.)
Experience as an Instructor		7 years in masters programs	Yes, LAFD Leadership & HR Trainer	Master Certified Coach
Experience as an Author	Yes, numerous articles			Yes, two books
References	Yes	Available	Available	Yes, testimonials
Project Hours	30			
Project Fee	Fixed: \$6,900	\$7,000 (\$3,500 pre-planning, \$3,500 retreat)	\$3,500	\$6,400 (Parts I-III); \$2,000-\$3,000 (Part IV)
Travel and Out of Pocket Expenses	All inclusive	Plus incidental costs may include materials, lodging and travel.	All inclusive	To be billed at cost.