



**City of Pinole
City Council Workshop
Held January 30, 2021**

February 2021

**Management
Partners**



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Workshop Report

The City of Pinole held a Council workshop on Saturday, January 30, 2021 via Zoom, from 10:00 a.m. to 2:00 p.m. The workshop provided an opportunity for the Councilmembers to discuss attributes of effective governance, review, and update Council norms, strengthen teamwork, discuss the City's work plan, and review the City Manager's proposed process of intake and disposition of the Council's special projects list. This report contains a summary of the results of the workshop.

Christine Butterfield, Senior Manager with Management Partners, facilitated the workshop. Ashley Garcia, Senior Management Advisor with Management Partners, assisted with the session and acted as recorder.

Workshop Overview

Objectives

- Review and discuss governance roles and practices of effective councils.
- Discuss and update the City of Pinole Council norms.
- Review and discuss the City's work plan (strategic plan strategies, core services and Council referrals) for the remainder of the fiscal year and identify key priorities.
- Discuss Council communications with staff (review the Council referral intake and status reporting process)

Agenda

- Call to order and welcome by the Mayor
- Public comments
- Consultant introductions and agenda review
- Ice breaker exercise
- Discuss governance roles and practices of effective councils
- Review article about high-performance governance
- Review Pinole City Council norms
- Review recent accomplishments, the City's work plan and discuss Council requests and the related disposition process
- Wrap up and next steps.

Participants

City Council

**Mayor Norma
Martinez-Rubin**



**Mayor Pro Tem
Vincent Salimi**



**Council Member
Anthony Tave**



**Council Member
Maureen Toms**



**Council Member
Devin Murphy**



Executive Staff

- City Manager Andrew Murray
- City Attorney Eric Casher
- City Clerk Heather Iopu

Workshop Ground Rules

At the start of the workshop, the facilitator suggested several ground rules to help the group have a successful workshop.



- Listen to understand each other's point of view.
- Seek consensus.
- Assume good intent.
- Speak up if we need course correction.
- Stay focused.

Bike Rack

The facilitator explained that items that were raised but would not receive immediate attention would be recorded on a "bike rack." The following item was added to the bike rack during the workshop:

- Request to see 2019 Council workshop report for reference.
(Management Partners subsequently provided a copy of the report to City staff.)

Workshop Preparation

In preparation for the workshop, Christine Butterfield held a conference call with the City Manager to discuss the workshop goals and flow. An agenda, handouts, and PowerPoint presentation were prepared.



Opening Comments

The workshop kicked-off with a call to order and a welcome by Mayor Martinez-Rubin. She reviewed the purpose of the workshop and thanked the Council and staff for participating in the day's discussions. The Mayor then opened the session up to public comments.

Christine Butterfield provided an overview of the day to help develop a shared understanding of the workshop's purpose and objectives. She reviewed the ground rules, agenda, and the purpose of the bike rack.

Ice Breaker Exercise

The Councilmembers participated in an icebreaker exercise to help foster a better understanding among the members, as they begin to govern together. Councilmembers shared a headline that they would hope to read about Pinole several years in the future. The headlines that were mentioned are listed below.

Headlines of the Future

- Pinole is Outside of Pandemic; City is Healthy and Safe; City Improves Revenues to Provide Services
- Pinole has Established a Thriving, Sustainable Community; Pinole is a Model City
 - ✓ Net Zero community, cutting edge technology, adequate resources, infrastructure, waste management, emergency planning, valued perspectives
- Pinole Recovers from COVID while Launching a Green Economy
 - ✓ Fight the climate crisis
- Businesses at New Development in Downtown Pinole are Open
 - ✓ More restaurants, full parking lots, safe for pedestrians
- Pinole Remains Fiscally Solvent, Makes List of Healthy Places to Live
 - ✓ Pinole balances wants and needs
- Pinole Delivers on Inclusivity Reflective of the Populations' Interests

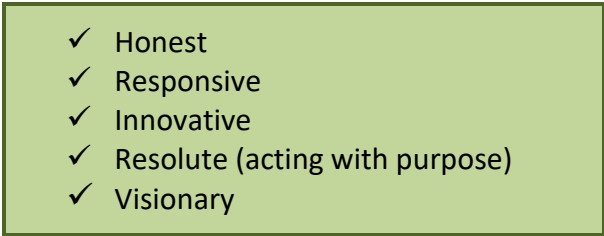


Governance Roles and Effective Councils

The facilitator led a discussion about the practices of effective councils, including teamwork principles, how to build working relationships, fostering productive communication, and how to disagree with a colleague and commit to civility in the process. The Councilmembers received reading materials in advance of the workshop and discussed two articles from the Institute of Local Government (ILG). Christine asked Council to reflect on what stood out to them in the discussion about governance practices and the ILG articles. The comments that were offered are listed below.

- Uphold values, focus on interests, not positions
- Speak to the issue not the person; engage in continuous personal learning and growth/development
- Need to spend time to define: *what does accountability look like?*
- Celebrate success, acknowledge differences within our team
- Community focus and needs identification; understand each other's perspectives; emphasize trust and openness; acknowledge that some items require a deeper dive for adequate discussion; once a decision is made, accept the will of the body
- Partnership is the most important thing for team effectiveness

Councilmembers were asked how they would like the community to view the Pinole City Council *in one word*. Councilmember responses are listed below.

- 
- ✓ Honest
 - ✓ Responsive
 - ✓ Innovative
 - ✓ Resolute (acting with purpose)
 - ✓ Visionary

City Council Norms

Councilmembers spent the next portion of the workshop reviewing and discussing the Pinole City Council norms which were created at the Council workshop in June 2019 and approved in August 2019.

The current norms are listed below.

1. Work for the **common good**, not for personal interest.
2. Communicate through the **City Manager**.
3. Work for “win/win” solutions by striving for consensus and **seeking common ground**.

4. The Council's **policy deliberation process** will be performed in the following order: Council questions; public questions/comment; Council deliberations; motion(s); decision made by majority vote.
5. **Praise** Council and staff decision(s) in **public** and offer **corrective comment(s) in private**.
6. Share information with each other early in the process to **avoid surprises**.
7. Address one another by **role and last name** and shake hands once the meeting concludes.
8. Establish a structure where the **Mayor calls on members**.

Summary of Comments

A summary of the Council's discussion about norms is provided below.

Sharing information. Councilmembers discussed sharing information with each other early in the process to avoid surprises. It was suggested that better interagency coordination would help prevent confusion related to interagency informational meetings such as the recent meeting request initiated by the school district to the Mayor and City Manager. The Mayor clarified that the meeting was solely informational. However, if policy issues or questions were a component of any future session involving outside agencies, the matter would be shared with the entire City Council.

Communicating through the City Manager. Councilmembers noted that weekly meetings with the City Manager are examples of communicating effectively through the City Manager. Council discussed adding the term "empowerment" to the norm to allow the City Manager to act administratively. Furthermore, Council noted that direct communication with Department Directors is important and committed to keeping the City Manager informed.

Accountability. The Council also explored the issues of accountability, constructive feedback, and positive affirmation regarding the norm of praise in public, correct in private. Additionally, it was noted that the norm number 7 is important to ensure Councilmembers titles and full names are used.

Policy deliberation. Other issues were raised related to the policy deliberation process. A need for clarity was brought up regarding Council deliberations so that each Councilmember has the opportunity to address the item with initial thoughts as well as follow up questions once they have heard from their colleagues to promote a better policy dialogue. Conducting meetings via Zoom is particularly challenging for

the deliberation process, so it would be helpful if a member of Council would summarize what the Council is voting on prior to the vote.

Liaison assignments. The Council discussed the ideas of submitting written reports to the City Clerk summarizing each Councilmembers' liaison assignments to City advisory boards and committees along with regional entities; increased use of Council workshops and study sessions to provide more time to explore policy issues; and a public-facing preview summary of upcoming agenda topics in the pipeline to forecast to Council and citizens what to expect in the future (i.e., two to three month).

Management Partners offered to return suggested edits to the norms based on the discussion, noting that some would pertain to Council norms and other items are process related. The suggested changes are listed below.

Summary of Suggested Amendments to Council's Norms

The following items were discussed as potential amendments to the City of Pinole Council norms for consideration at a future meeting.

- Prior to Council vote the proposed action will be read aloud so that the entire Council is clear about what they are voting on.
- Summaries of Council liaison (i.e., advisory committees and regional agencies) assignment meeting will be submitted to the City Clerk periodically and be included as attachments to Council agendas and reflected in the minutes.
- Add the word "empower" to norm number 2 to read, "*Empower and communicate through the **City Manager**.*"

Final Revised Set of Norms

For the Council's convenience, we have provided the final list of norms. This includes a revision to the second norm and two new ones added (numbers 9 and 10).

1. Work for the **common good**, not for personal interest.
2. (*Revised*) Empower and communicate through the **City Manager**.
3. Work for "win/win" solutions by striving for consensus and **seeking common ground**.
4. The Council's **policy deliberation process** will be performed in the following order: Council questions; public questions/comment; Council deliberations; motion(s); decision made by majority vote.

5. **Praise** Council and staff decision(s) in **public** and offer **corrective comment(s) in private**.
6. Share information with each other early in the process to **avoid surprises**.
7. Address one another by **role and last name** and shake hands once the meeting concludes.
8. Establish a structure where the **Mayor calls on members**.
9. *(New)* Prior to a Council vote, where there may be confusion, the proposed action will be read aloud so that the entire Council is clear about what they are voting on.
10. *(New)* Summaries of Council liaison (i.e., advisory committees and regional agencies) assignment meetings will be submitted to the City Clerk periodically and be included as attachments to Council agendas and reflected in the minutes.

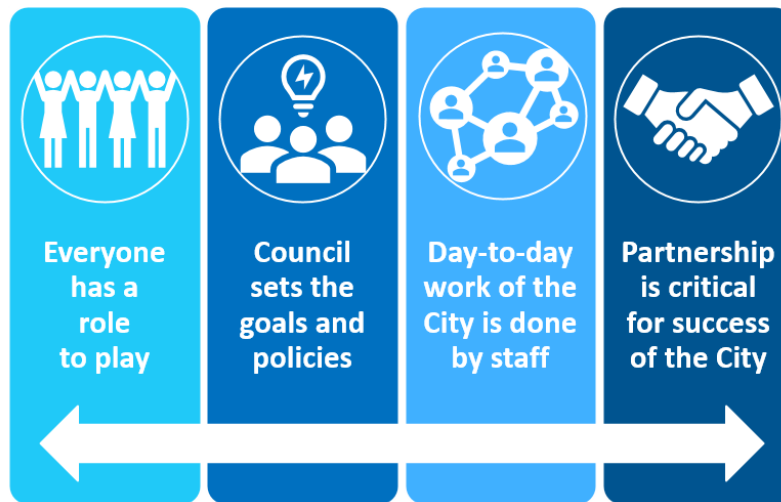
Administrative Practice Refinements

The following section includes refinements in administrative processes to improve customer service to the Council and community.

- The City Manager will work with Council to identify Council meeting items that would benefit from more time for discussion than would normally be provided during a regular meeting. He/she will schedule workshops and study sessions as needed to provide sufficient time to explore such policy issues.
- The City Manager will prepare a multi-month Council agenda forecast that will list topics “in the pipeline” for consideration at future meetings. This will be made available to both the Council and public, with the intention of improving information for all about upcoming items.

Roles

The Council and staff reviewed the respective roles of the City Council, the City Manager, advisory committees, and the City Attorney. There was agreement on the roles and no additional clarifying questions.



Accomplishments, Work Plan and Council Referrals

After breaking for lunch, the group reconvened to review the City's recent accomplishments, staff work plan, Council referrals and the disposition process related to the referrals. (See Attachment A.) The City Manager provided an overview of these items.

The City's four strategic plan goals are:

- Safe and resilient,
- Financially stable,
- Vibrant and beautiful, and
- High performance.

Timelines. The City Manager presented proposed updated timelines for the start and completion of Strategic Plan strategies. The Council agreed with the proposed updated timelines. Staff will publish the timelines on the City's strategic plan webpage. Council concurred with the City Manager's suggestion for quarterly reporting by staff on progress on strategies. The City Manager noted that the work plan is a living document. Council agreed to the City Manager's suggestion that Council conduct a thorough review of the Strategic Plan on an annual basis as part of the annual budget process in the spring.

Council Requests and Referrals

The Council discussed its “future agenda items” requests and referrals list that they use for assigning projects and tasks to staff. The City Manager noted that staff has limited capacity to take on extra items and is looking for direction and concurrence from Council in better managing these requests.

The City Manager proposed a new process for handling the Council’s list of requests and referrals from 2018 to the present. The new process involves sorting them into categories, as follows:

- Budget and capital improvement program (CIP) process,
- Informational memorandums to Council,
- Future Council meeting topics,
- Strategic plan updates, and
- Elimination of duplicate requests.

For several requests requiring funding, the City Manager suggested determining during the budget process whether or not to move forward and, if so, to allocate resources as needed.

The Council concurred with the categorization and process presented by the City Manager.

The City Manager recommended, and Council agreed, that staff return to Council with specific proposed revisions to the Council meeting procedures to update the requests for future agenda item portion of the procedures to illustrate that Council can task staff with numerous types of follow up, not just assignment of future agenda items.

Council also asked that when items come back for regular discussion that staff include the date that the item will appear on a future Council meeting agenda.

Other Process Comments and Clarifications

Staff clarified that Councilmember requests for proclamations go through the City Clerk’s Office. The City Attorney explained that the process to add and remove items from the future Council agenda item list is by a majority vote of the City Council during a Council meeting, but that the action has not normally identified a time certain, and no discussion of the item can take place when the item is originally added based on the Brown Act requirements. The Council reiterated the interest that staff schedule more workshops or listening sessions from complex policy review.

The Council also asked if there are other steps to improve and increase efficiencies across the organization as well as methods to build capacity.

The City Manager said he would direct staff to provide a thoughtful assessment of possible efficiency improvements, including potential investments in technology and/or equipment, as part of the budget process.



Wrap Up and Next Steps

The facilitator explained that Management Partners would prepare this workshop summary report.

To conclude the workshop, each Councilmember was asked to offer one thing that was useful from the day's discussions. Highlights of comments made are listed below.

- We have a lot on our plate. Glad we can all seek solutions to tackle the list together. Proud of the ground covered so far.
- Good discussion to have at the beginning of the year and lay the foundation moving forward. Miss in-person discussion.
- Diverse Council and honored to work with you; filled with optimism.
- Coming together, common direction; review and reiterate of what is key to us.
- Proud to work with the Council; it was helpful to specify goals and lines of communication. Now we can implement and move forward.
- Despite a challenging year, we are making significant progress.
- Appreciate thoughtful discussion and direction provided to staff; great to revisit norms.

- Engaged and diverse Council has the community's best interest at heart. We will move to become a model organization and do innovative things.

Attachment A: City Manager's Presentation



January 30, 2021 Council Workshop

Item 4.B. Review and Direction on Scheduling of Strategic Plan 2020– 2025 Strategies and Pending Future Council Agenda Items

We Will Cover...



- Review of City services
- Review proposed updated timelines for Strategic Plan strategies
- Review proposed process and timelines for completing “future Council agenda items”

Review of City Services



- We're going to start with BIG picture to provide context for Strategic Plan timeline, Council requests timeline, and future work planning and budget discussions

Review of City Services Cont'd



- Many levels of government, distinct responsibilities (federal, state, county, city, and special districts)
- Cities primarily responsible for public safety, land use, and public works. Also often recreation, sometimes utility services (clean water, wastewater, and power)
- In many communities, recreation, utility services, and aspects of public safety are provided by special districts

Review of City Services Cont'd



- Pinole is considered a “full service” city
 - Provides all traditional municipal services to its residents, opposed to county or special district
- Provides some services (fire protection and sewer) that are provided by special districts in many other cities
- We are really “full service plus”
- Pinole does a lot for a small city!
 - A source of pride, and a challenge...

Review of City Services Cont'd



- Majority of City staff is dedicated to providing core public-facing City services
 - Police and fire
 - Land use management
 - Building safety
 - Local transportation infrastructure (streets, signals, bike lanes, etc.)
 - Sewer

Review of City Services Cont'd



- Other City staff provides additional public-facing services
 - Outdoor recreation space and facilities
 - Recreational and educational programs
 - Cable television programming
 - Childcare programming
 - Senior services
 - Others

Review of City Services Cont'd



- Additional City staff provides internal services to support the public-facing operations
 - Finance
 - Legal
 - Human resources
 - Information technology
 - Records management
 - Facilities and equipment

City Staff Activities



- Performing routine functions consumes most of staff's time

City Staff Activities



- Routine Activities

Function	Sub-Function
Police	Prevention and Engagement, Patrol, Response, Investigations
Fire	Prevention, Suppression, Emergency Preparedness
Land Use Management	Current Planning, Long -Term Planning, and Code Enforcement
Building Safety	Building Plan Review and Inspections
Local Transportation Infrastructure	Roads, Bridges, Sidewalks, Traffic Control Devices
Sewer	Collection System and Treatment Plant

City Staff Activities



- Routine Activities Cont'd

Function	Sub-Function
Stormwater and Solid Waste Management	Storm drain management program and garbage, recycling, and green waste collection contract
Other "Community Services" Functions	Outdoor Recreation Space and Facilities, Recreational and Educational Programs and Events, Cable Television Programming, Childcare Program, Senior Services, Food Support

Internal Process Improvement Projects



- In addition to routine functions, staff works on internal process improvement projects as time permits
 - They ensure that we are operating efficiently and meeting evolving regulatory requirements
- Completed in first half of fiscal year (FY) 2020-21
 - Telecommuting policy
 - Electronic signature system
 - Updated procurement policy
 - Online payment system

Internal Process Improvement Projects

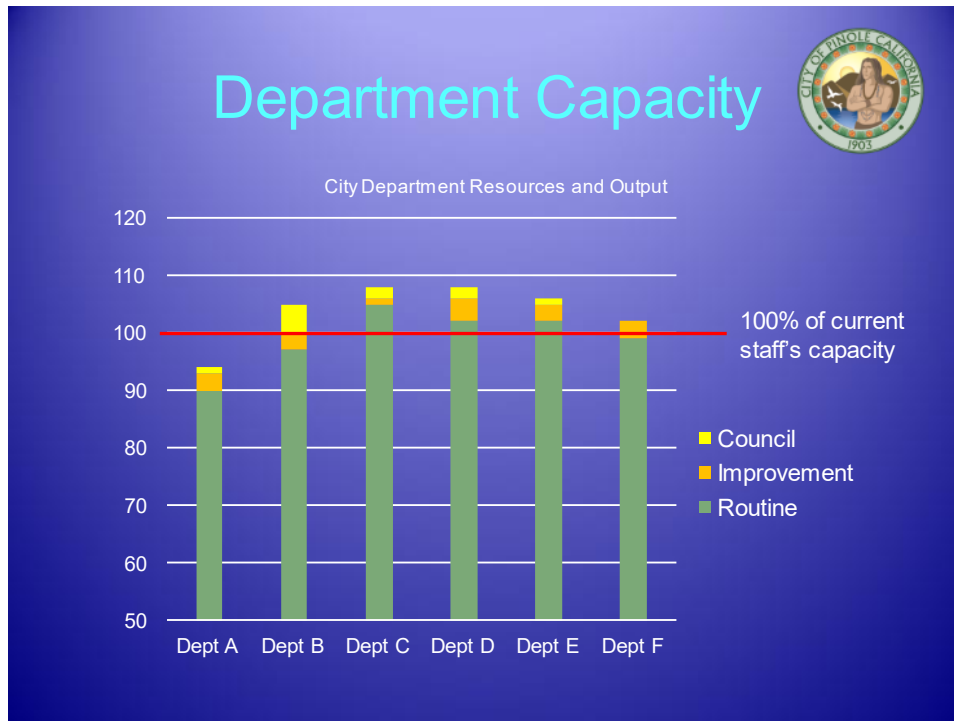


- Completed in first half of fiscal year (FY) 2020-21
Cont'd
 - Updated finance procedures
 - Pilot program for implicit bias screening
 - New information systems for incident response
 - Additional wildland fire mitigation strategies
 - Enhanced turf management program
 - Use of electronic capital project bidding platform

City Staff Activities



- Some departments need additional resources to perform routine activities and process improvements
 - Will be discussed during presentation of Citywide Organizational Assessment at February 2, 2021 Council meeting
- After addressing routine functions and process improvements, staff has limited ability to work on Council-assigned tasks and special projects (Strategic Plan “strategies” and other Council requests (future agenda items))



City Staff Activities

- Department Workload

	Routine Activities	Internal Process Improvement	Council Strategic Plan Project ("Strategy")	Other Council Tasks
Dept A				
Dept B				
Dept C				

Strategic Plan



- That was the BIG picture on City services and staff activities...
...now Council-assigned tasks and special projects (Strategic Plan “strategies” and other Council requests (future agenda items))

Strategic Plan



- City of Pinole Strategic Plan 2020 – 2025
- Adopted in February 2020
- Identifies four major goals
 - Safe and resilient, financially stable, vibrant and beautiful, and high performance
- Directs staff to undertake 22 individual “strategies” (special projects) over five years
- Strategies are foundational efforts that will significantly improve City services and the community

Strategic Plan Cont'd



- Strategic Plan Implementation Action Plan (IAP) issued August 2020
 - Identified year in which staff would start work on each strategy
- Staff has reviewed IAP and proposes updated timelines for strategies (in packet)
- Staff proposes to begin work on 15 of the 22 strategies, and complete work on six of them, in the current fiscal year (FY), 2020-21
 - One more strategy proposed to begin in current FY than in original IAP

Strategic Plan Cont'd



- Any questions or concerns about proposed updated timelines?
- Staff proposes to provide quarterly update to Council on status
- Staff recommends that Council conduct thorough review of Strategic Plan, and make any desired changes to goals and strategies, annually in conjunction with budget process
- Does Council approve proposal & recommendation?
- Staff excited to work on these thoughtful, foundational projects!

Other Council Requests



- There are many other good ideas out there to explore...
- Council has “future agenda items” mechanism to assign tasks and projects to staff
- Under current staffing levels, staff has very limited ability to work on these given responsibilities for routine work, process improvement projects, and strategies

Other Council Requests



- From December 2018 through January 2021, Council approved 140 future agenda items
- Staff has completed 79, including:
 - Temporary eviction moratorium
 - Temporary outdoor dining permits
 - City food drive
 - Downtown holiday tree lights
 - Basketball court renovation for David Patrick Underwood
 - COVID -19 small business assistance program

Other Council Requests



- Staff does not have the bandwidth to complete the remaining 61 items as standalone Council agenda items in the foreseeable future
- Staff proposes process for categorizing items and addressing most before the end of the current fiscal year

Other Council Requests



- Proposed process for disposition
 - Address in FY 2021 -22 budget process (6)
 - Address in FY 2021 -22 CIP process (9)
 - Staff provide info to Council via memorandum (9)
 - Schedule for future Council meeting (20)
 - Address through next budget process or Strategic Plan update (9)
 - Remove duplicates from list (8)
- Proposed process will enable staff to efficiently and expeditiously complete items
- Is the proposed process acceptable to Council?

Other Council Requests



- Staff proposes to provide quarterly update to Council on status
- Staff believes that Council should have the opportunity, as part of regular Council meetings, to assign tasks to staff, both future Council agenda items and other types of staff follow up
 - Staff proposes to return to Council with proposed revisions to Council procedures for broader Council task assignment process
- Does Council approve proposal?

Next Steps



- If staff has increased bandwidth, it can work on additional special projects
- The consultants that are completing the Citywide Organizational Assessment will recommend some changes to organizational structure and additional staffing
- City staff will seek Council's approval of additional staffing as part of the FY 2021-22 budget

Thank You and Questions



Thank you for providing direction on timelines and how staff can efficiently and expeditiously complete the full range of Council -assigned tasks.

?’s

Attachment B: Management Partners Presentation



City of Pinole City Council Workshop

January 30, 2021
10:00 a.m. to 2:00 p.m.
Via Zoom

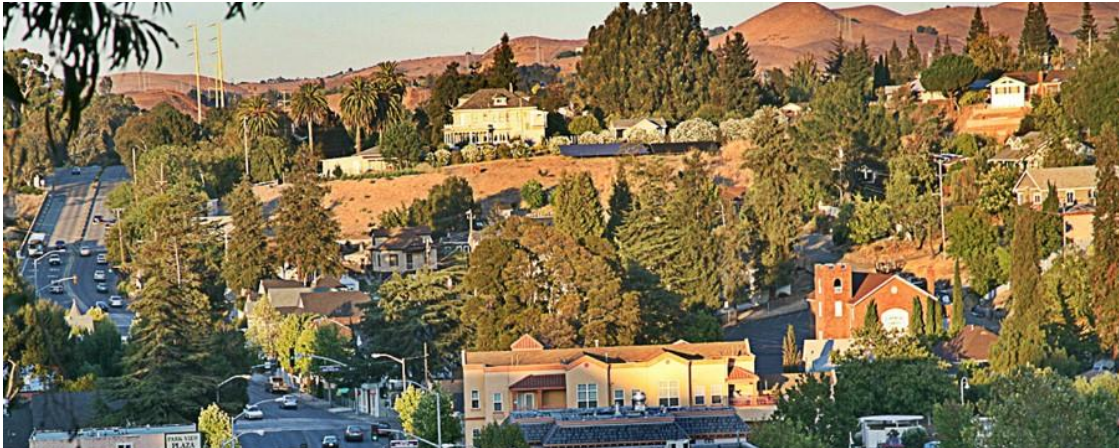
Christine Butterfield, Senior Manager
Ashley Garcia, Senior Management Advisor



Mayor's Welcome



Public Comment



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3



Today's Objectives

- Review and discuss **practices of effective councils** and **Council norms**.
- Review and discuss Pinole **governance roles**.
- Review and discuss the City's work plan (strategic plan strategies, core services and Council referrals) for the remainder of the fiscal year.

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4



Today's Agenda



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- Welcome and Public Comment
- Discuss Practices of Effective Councils and Pinole's Council Norms
- Review Governance Roles
- Review Recent Accomplishments and Highlights of the City Work Plan
- Review Council Special Projects for Fiscal 2020/2021
- Wrap Up and Next Steps

5



Suggested Ground Rules



**Listen to
understand
each other's
point of view**



**Seek
consensus**



**Assume good
intent**



**Speak up if we
need course
correction**



Stay focused

Management
Partners

6



Bike Rack

- Things to discuss at another time will be tracked separately
- Time management tool



7

Thoughts for the Future

What headline do you most hope to read about Pinole in the next several years?



8

Refresher of Effective Practices for Elected Officials



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9



TEAMWORK

- Getting things done for the community as a team makes us all look good
- Accomplishments build relationships... which lead to other successes



Attributes of High-Performing Councils

- Commit to partnering among Councilmembers, City Manager and staff
- Exhibit clarity and respect for roles and responsibilities
- Demonstrate civility and respect for all
- Conduct effective meetings
- Hold themselves and the City Manager accountable
- Practice continuous learning and remain curious



Good Governance Is About...



Building relationships through:

- Effective leadership by the Mayor and Council
- Responsive management and leadership by the City Manager
- Meaningful communication that is honest, direct, respectful, proactive
- Understanding roles and fulfilling expectations
- Fostering mutual respect and building trust
- Ethics

More About Communication

Focus on outcomes

- Be attentive
- Ask clarifying questions

Separate people from the problem

- Focus on interests, not positions
- Invent options for mutual gain
- Insist on using objective criteria



Disagree in a Way That Maintains the Team

What if I disagree with a colleague on an issue?

- That's fine! *Just do it with...*



Dignity



Support



Respect



Inclusiveness



14



Effective Governance Practices: Council Discussion



What **stood out** to you in this discussion and the ILG articles?



15



Have Fun!



Celebrate successes



See the humor in your spectacular failures



Enjoy your experiences —you worked hard to get here!



16



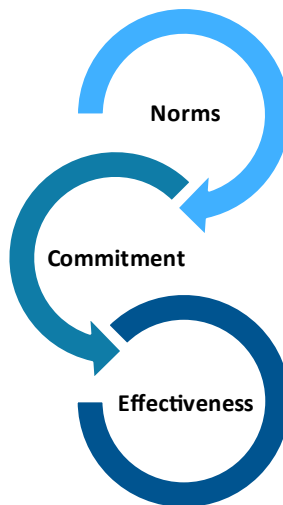
*In one word, how do
you want the
community to view the
Pinole City Council?*



17



Council Norms



18



Pinole Council Norms



- Work for the **common good**, not for personal interest.
- Communicate through the **City Manager**.
- Work for “win/win” solutions by striving for consensus and **seeking common ground**.
- The Council’s **policy deliberation process** will be performed in the following order: Council questions; public questions; Council deliberations; motion(s); decision made by majority vote.

19



Pinole Council Norms (continued)



- **Praise** Council and staff decision(s) in **public** and offer **corrective comment(s) in private**.
- Share information with each other early in the process to **avoid surprises**.
- Address one another by **role and last name** and shake hands once the meeting concludes.
- Establish a structure where the **Mayor calls on members**.

20



Council Norms Discussion



- *What do these look like in practice?*
- *Which of these works well?*
- *Any changes you would like to see?*



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Review Governance Roles

City Council
City Manager
Commissions and Committees
City Attorney

- Policy role
- Administrative role
- Advisory role
- Legal role



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City Council – City Manager Relationships

- **Council**
 - ✓ Sets policy and overall direction
 - ✓ Determines service areas and special projects
 - ✓ Keeps in touch with community concerns
- **City Manager**
 - ✓ Implements Council policy, service areas and special projects
 - ✓ Handles day-to-day operations
 - ✓ Offers policy advice
 - ✓ Manages staff



City Council – City Manager Relationships

- Important to find the line and stay within your area of responsibility
- Yes, it is often complicated, but...
 - ✓ Best if the Council is not involved in staff and administrative matters; and
 - ✓ Best for the City Manager to not dominate public discussions.



Council Member Role

- Do what is in the best **long-term interest** of the community
- **Respect** the chain of command
- Work through the City Manager (or department heads with copy to CM)
- **Meet** with the City Manager on a regular basis



Mayor's Role

- Run **Council meetings**
- Serve as **initial point of contact** for external agencies for the City Council
- Serve as a **sounding board** for the City Manager on policy and key programmatic matters
- Carry out all roles listed for **Council members**



Commissions and Committees

- **Advise** Council on issues related to their respective field
- Hold **public meetings** to hear how the public feels about issues
- **Gather information** and analyze issues
- **Recommend** policies and procedures



City Attorney's Role

- **Represent the whole organization**, not individual Council members or members of the public
- Provide clear and accurate **legal advice** on a myriad of complex laws
- Be **fair and impartial**
- Provide **full disclosure**
- Use **candor and diplomacy**



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- Use **candor and diplomacy**



Council – City Manager and Staff Partnership





Review City Work Plan



33



City Manager Comments

- 1. Review City work plan highlights (strategic plan and service area initiatives)**
- 2. Review Council requests slated for action in the current fiscal year**
- 3. Review staff's proposed process for disposition of Council requests going forward**



Wrap Up and Next Steps

*Management Partners will
prepare a workshop summary*

*What is one takeaway from
today's workshop?*



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City of Pinole Council Workshop

Thank you!



Attributes of Exceptional Councils

Leading public organizations and governing with colleagues on a council is a challenging art of community service. The Institute recognizes that many aspects of leadership and governance are not intuitive. This piece is intended to provide councilmembers and city managers insight into the attributes of exceptional councils as well as provide practical tips to help them become exceptional.

1. Exceptional councils develop a sense of team – a partnership with the city manager to govern and manage the city

The mayor, councilmembers and city manager see themselves and work as a team as they undertake a series of tasks to further their common purpose. The individual team members work in a coordinated and collaborative manner with a high degree of respect, trust and openness. The team values diversity in style and perspective. The team thinks and acts strategically as it examines issues/situations and decides on a course of action serving their city's mission and goals.

KEY CHARACTERISTICS

- Successfully transition from candidate to a member of the council.
- Become a champion of the city. Make decisions based on the needs and interests of the community at-large / the greater good.
- Develop, communicate and support policy goals and council decisions.
- Demonstrate a willingness to work collaboratively (as a team) and have a citywide perspective.

BEST PRACTICE TIPS

Build capacity to create a more effective team. The governance team (mayor, councilmembers and city manager) should get to know each other; how each person approaches issues, decision making style and so on. This can be accomplished at annual meetings or workshops through-out the year. In the event that councilmembers disagree, clear ground rules (norms of behavior and practice) can help quell acrimony before it becomes a problem. It's important to remember that trust is built around understanding and respect, not necessarily agreement.

2. Exceptional councils have clear roles and responsibilities that are understood and adhered.

Exceptional councils understand their role is to serve as policy maker - to represent the values, beliefs and priorities of their community while serving in the community's best interest. They carry out a variety of responsibilities including: developing and adopting a vision for the city; focusing and aligning plans, policies, agreements and budgets in furtherance of this vision; and holding themselves and the city manager accountable for results.

Exceptional councils understand that the city manager is responsible for the day-to-day operations of the city. The city manager is responsible for undertaking and accomplishing the policy objectives of the council. Exceptional councils recognize the subject matter expertise of staff and utilize their knowledge and experience to guide and inform decision making.

KEY CHARACTERISTICS

- Understand the role of local government and their responsibilities.
- Know their role- to set vision and policy, avoid micromanagement.
- Councilmembers should strive to be informed about the issues facing the city and be prepared to ask questions of staff and each other.

BEST PRACTICE TIPS

Create a shared understanding of the city manager's role and the council's expectations to optimize the working relationships. This shared understanding is informed by local charter and ordinance provisions that provide the overall framework for the relationship. The council should make time to have conversations during retreats and or study sessions to define and/or reveal and refine their role and responsibilities. Since role clarity between the city council and city management is critical to mutual success, having clear protocols helps avoid misunderstandings.

3. Exceptional councils honor the relationship with staff and each other

Exceptional councils understand that a good working relationship with staff is vital for the city to be run successfully. Exceptional councils treat each other and staff with dignity and respect. They act with civility and a high level of professional decorum. Councilmembers build trust by not playing the “gotcha game” and strive to have a no secrets, no surprises approach as an operating norm. Finally, they respect the diversity of styles and perspectives among their colleagues and staff and are open to new ideas.

KEY CHARACTERISTICS

- Councilmembers have the ability to respectfully disagree (to disagree without being disagreeable). They are able to leave it at the dais; debates are about policy, not personality.
- Exceptional councilmembers reflect positive decorum/model of leadership by providing respectful tone with colleagues.
- Establish a set of behaviors ahead of time, potentially documented in a code of conduct, to help promote civility and respect.

BEST PRACTICE TIPS

Set council priorities and strategic goals at an annual meeting; these goals and priorities are a tool to guide the city manager and staff on where to focus their efforts. This annual meeting provides time for the council to reflect on community priorities as well as offer an opportunity to discuss their decorum and their relationship among each other and the relationship between the city manager/staff and the council.

4. Exceptional councils routinely conduct effective meetings

Open and public meetings are central to democratic decision-making. Exceptional councils master the art of effective meetings. They develop and adhere to meeting protocols and processes. They spend time planning and organizing the agenda with the aim of having a more focused meeting. They allocate the council’s time and energy appropriately (focused on the council’s role and responsibilities) and meeting short- and long-term priorities. They honor the public’s participation and engagement and they generally start on time and are held during reasonable hours.

Exceptional councils use public meetings not only for their intended purpose, information sharing and decision-making,

KEY CHARACTERISTICS

- Councilmembers are respectful of each other, the public and everyone’s time.
- Councilmembers use engaging body language as a way to demonstrate respect.
- Issues are not personalized, thoughtful dialogue is the objective.
- Agenda packets are read, councilmembers come prepared and have an open mind
- Respect is demonstrated for varied opinions.
- Everyone strives to be civil and act with decorum.

but they also use the meeting to demonstrate respect and civility for each other, staff and the public. Exceptional councilmembers prepare in advance of the meeting, remain focused on the city goals and objectives and mindful of their role and responsibilities.

BEST PRACTICE TIPS

Develop and adopt (with regular reviews and updates), guidelines for conducting meetings and making decisions. These governance protocols typically address meeting procedures (agenda preparation, how to put issues on the agenda, debate and voting procedures (parliamentary rules) and standards of decorum (civility)). As part of a regular self-assessment, councils should evaluate their meetings and their effectiveness and adjust behavior and practices for better results.

5. Exceptional councils hold themselves and the city accountable

Exceptional councils operate openly, ethically and work to engage the community in a myriad of decisions impacting the prosperity and well-being of their community. Toward that end, exceptional councils consistently provide short- and long-term strategic direction and goals, as well as provide budget, program and policy oversight.

Exceptional councils hold themselves accountable for the conduct, behavior and effectiveness of the council. They establish clear priorities and goals and hold the city manager accountable for results. And finally, they embrace accountability as a process and tool to calibrate ongoing efforts to address and meet policy and program objectives.

KEY CHARACTERISTICS

- Councilmembers operate ethically and with integrity.
- Councils conduct team building / goal setting exercise to track progress towards mutually agreed upon goals
- Councils taking responsibility for the results (good and bad).
- Councils celebrate success.
- Councilmembers hold themselves responsible for adhering to operating protocols and codes of conduct.

BEST PRACTICE TIPS

Annually evaluate council and city manager performance toward achieving the city's priorities and goals (consider having this be part of an annual goal setting meeting). Council should consider assessing its own behavior and effectiveness as part of its annual self-assessment.

6. Exceptional councils have members who practice continuous personal learning and development

Governance is not intuitive. In addition, the policy and economic environment impacting cities are ever changing. Exceptional councils continually provide the opportunity to build their knowledge and skills, to enhance their understanding of key issues, increase their awareness of best practices and sharpen their leadership and governance skills.

KEY CHARACTERISTICS

- Stay informed on key issues
- Gain key insights and knowledge on all aspects of governing, from budgets to plans and everything in between.
- Learning to listen is sometimes more important than learning to give a speech.

BEST PRACTICE TIPS

Seek out national, state and local professional growth and educational opportunities. These opportunities can focus on the nuts and bolts of governing to helping you gain valuable information and/or insights on key policy issues facing your city. In addition, city run orientations for newly elected officials provide a good way to acclimate new members to the council's norms and protocols as well as the budget and key policy issues.

Strategies for Creating a More Collaborative, Effective Council

This whitepaper originally appeared as an article in the September 2011 issue of Western City magazine.



Running local government successfully is hard work. City officials know that it requires serious commitment, time and knowledge on the part of local officials and staff as well as community members. Local policy-making is also a collaborative activity. The current economic and political challenges facing California exert tremendous pressure on mayors and council members to work together collaboratively and effectively. Issues that affect the future well-being of their cities also spur local officials to have conversations and collaborate with members of the public about the kind of community they envision for themselves and their children.

The need for collaboration — between individual council members, among councils as a whole and between local officials and the community — prompted the League to ask the Institute for Local Government (ILG) to conduct an Advanced Leadership Workshop on this topic during the League's Legislative Action Days in May 2011.

Nearly 40 mayors and council members participated in this interactive, highly rated session titled "Creating More Collaborative Councils: Strategies for Effective Communication, Meeting Management and Public Engagement." The workshop explored key issues related to the work of elected local officials and provided participants with the skills and strategies to more effectively:

- Communicate and problem-solve with colleagues;
- Maintain collaborative relationships with fellow council members;
- Preside over and participate in city council meetings;
- Interact with and respond to members of the public; and
- Design effective and inclusive processes for engaging the public.

This article presents some of the workshop's highlights.

Communication and Problem-Solving

On any given day, we all may do a better or worse job in effectively communicating information with others in our work, civic and family lives. The quality of communication with others can present a challenge for local elected officials, who work largely in the public sphere and must deal with multiple audiences, limited time and a broad range of content. The issue of communicating with council colleagues is no exception.

Proponents of effective communication suggest a few simple rules to help us keep our speaking and listening skills well honed, thus supporting our goals and relationships.

Be attentive. Whether with an individual colleague or in council chambers before a packed house, paying attention to the speaker, the subject at hand and (as appropriate) the interpersonal dynamics involved will make you a more effective communicator and help you to be perceived as a respectful, effective colleague and public servant.

Ask clarifying questions. This shows a desire to better understand the speaker and demonstrates both attentiveness and an interest in learning more. Typically this is a better communication choice than a quick emotional retort or an immediate explanation of your own views. Asking clarifying questions helps increase the likelihood of a more productive conversation or exchange.

Let people know you are listening. Two very simple ways to do this include paraphrasing and using a perception check.

Paraphrasing is repeating the essence of the speaker's remark, thus conveying that you've heard the substantive content of what he or she has said; for example, "So you're saying that you believe this would kill all the fish in the stream — is that right?" A perception check involves acknowledging the emotional content of a speaker's comment; for example, "I can hear that you're very worried about the safety of neighborhood residents if we remove that stoplight," or "I want you to know that I hear how angry you are about this and how important the issue is to you." Both paraphrasing and a perception check can be important communication tools for council members. Neither suggests you are necessarily agreeing with the speaker or expressing your own opinion on the issue at hand.

Distinctions between Values, Interests and Positions

Your conversations with other individual council members or residents often concern topics that they (and perhaps you) feel very strongly about. It may seem there is no way to even begin to have a useful discussion about such topics. However, understanding the distinction between a value, an interest and a position can be helpful when tackling this type of situation. Consider these examples:

- "Children are our community's most important resource." This is a *value*;
- "I want a park and open space where our children can play." This is an *interest*; and
- "I want a park and skateboarding area at the corner of Palm and Main with the city contributing all the funds." This is a *position*.

Listen for and ask about values and interests that underlie speakers' expressed positions. People can more readily understand each other's values and interests than they can accept different positions. Typically there are more ways to satisfy interests than to bridge conflicting positions. A conversation about values or interests can often reduce or clarify differences.

The following basic principles of collaborative problem-solving (or "principled negotiation"), developed by Roger Fisher and William Ury and presented in their book *Getting to Yes*, also offer helpful guidelines for working through a knotty issue with a colleague or guiding group discussions.

Separate the people from the problem. It's not unusual for emotions to cloud problem-solving when people feel strongly about an issue. However, it is far more effective to attack the problem together, not each other. It's also a much better way to preserve an important working relationship.

Focus on interests, not positions. Taking a hard negotiating position can obscure what is really wanted. A conversation about interests, which tend to be broader than positions, creates more opportunities for coming up with an idea that appeals to all participants. Discussing interests rather than focusing on positions means that there's a lot more to talk about and improves the chances of success.

Invent options for mutual gain. In the typical back and forth of "making your case" there is often little opportunity to jointly think about and creatively invent new ideas that may be in the interests of both (or all) negotiators. However, this type of creative thinking probably won't occur unless it's given a time and a place to happen, and making time for this step is especially important when addressing polarized local issues.

Insist on using objective criteria. This is perhaps the hardest problem-solving guideline to follow — but perhaps the most important — in what is often a challenging political environment. Working to creatively solve a problem or reach an accord can be advanced if the participants can agree on some sort of common standard or a result that they think makes sense.

Civility and Council Member Behavior

Much media attention has focused lately on the question of civility in public discourse, and many city councils are grappling with the challenge of how to ensure civility among council members in their own deliberations.

Highlighting the current interest in this topic, the New Jersey State League of Municipalities recently published an article titled "The Need for Civility in Local Government Dialogue" (www.njslom.org/need_for_civility.html). The article presents author John

C. Gillespie's 10 commandments of public civility, which include these admonishments:

- Thou shalt not allow legitimate critique of policy and practice to become a personal attack aimed at the person who devised the policy or implements the practice;
- Thou shalt not rudely interrupt a colleague midsentence nor "speak over" a colleague while he or she is speaking;
- Thou shalt not pretend something is much more important than it really is simply to score points with an audience; and
- Thou shalt always recognize that your colleagues were also elected, just as you were, and deserve the same level of respect for having run and won.

Gillespie's 10 commandments serve as useful guidelines for councils striving to improve the tone of discussions. Another helpful resource, the Institute for Local Government's *Promoting Civility at Public Meetings: Concepts and Practices* (www.ca-ilg.org/civility), examines civility in conceptual and ethical terms and offers practical strategies for achieving greater civility in public discourse.

A growing number of cities are creating handbooks that help council members (and the public) better understand city government and council members' roles and responsibilities. In addition, cities are adopting ground rules for council meetings that extend beyond procedural rules and address expectations and guidelines for council member conduct. One example of such rules comes from the City of Davis:

Council members should actively pay attention while others are talking. Council members should be aware that side conversations, note writing and nonverbal expressions made by council members can be distracting to the meeting. Be aware that other council members, staff and the public in attendance can hear and see these actions.

The City of Hayward's *Council Member Handbook* includes the following:

Council members shall accord the utmost courtesy to each other, to city employees and to the public appearing before the council and shall refrain at all times from rude and derogatory remarks, reflections as to integrity, abusive comments and statements as to motives and personalities.

Other sections of Hayward's handbook address sanctions for violating the various rules of procedure.

Beyond Robert's Rules of Order

Whether you serve on a board, council, commission or other governing body, it is helpful to understand how to conduct public meetings. To simplify the rules of parliamentary procedure for those who participate in public meetings, Judge David Rosenberg created a video titled "Rosenberg's Rules of Order: Simple Parliamentary Procedures for the 21st Century." Prior to becoming a Yolo County Superior Court judge, Rosenberg served as mayor and council member for the City of Davis and as a Yolo County supervisor. (The video is based on a two-part article written by Rosenberg and originally published in *Western City* magazine in 2003. A newly revised pocket guide of Rosenberg's Rules will be available later this year.)

As part of the Institute for Local Government's service to local officials, the video and accompanying downloadable documents are available at www.ca-ilg.org/rosenbergrules. Test your knowledge of parliamentary procedure rules of order by taking the quiz (below).

Effective Public Engagement

The ability to effectively involve the public in decision-making is an essential skill for local officials. Many local agencies are facing serious challenges on issues ranging from budgeting and fiscal policy to climate change and public safety. Public engagement comprises a broad range of methods to inform members of the public about decisions that affect them and to invite their participation in the process. Such methods include but are not limited to public information and outreach efforts, public consultation and public deliberation (for more information, visit www.ca-ilg.org/PEbasics).

Successful public engagement can help local agencies manage challenges by contributing to the following outcomes:

- **Better identification of the public’s values, ideas and recommendations.** Well-executed public engagement can provide more nuanced views about an issue from a broader spectrum of residents than a simple “yes” or “no” election.
- **Residents who are more fully informed about issues and local agencies.** Public engagement presents opportunities for residents to better understand the issues and challenges impacting their community, grapple with practical problems and real trade-offs, and see local agency challenges as their own.
- **Improved local agency decision-making and actions with better results.** Members of the public provide rich sources of information regarding their community history and needs. This information can inform local agency decision-making and potentially produce superior results.
- **Enhanced community buy-in and support.** Involving members of the community in a meaningful way can build a sense of ownership and greater support for the local agency decision. It can also reduce contentiousness.
- **Faster project implementation with less need to revisit issues again.** Mutually agreed-upon decisions are less likely to continually reappear as issues of concern both for local agencies and community members.
- **More trust — in each other and in local government.** Open dialogue, shared interests and mutual problem-solving can bring disparate groups of people together, potentially resulting in increased trust in the others’ ability to solve problems and make good decisions.
- **Increased community participation and leadership development.** Positive experiences with public engagement can lead to better informed residents who are more likely to participate in other community activities and have the confidence and skills to become future local government leaders.

Additional Resources

For additional resources, visit:

- www.ca-ilg.org/engagement
- www.ca-ilg.org/civility
- www.westerncity.com/Western-City/December-2010/Transparency-In-Local-GovernmentProtecting-Your-Community-Against-Corruption/
- www.westerncity.com/Western-City/October-2009/Meeting-Great-Expectations-Dealing-With-Emotional-Audiences/

Rosenberg’s Parliamentary Procedure Quiz

Choose the correct response for each item. Answers appear at the end of this page.

1. You are a city council member. At a council meeting, you can’t hear the discussion due to noise made by the heating system. You should raise your hand and, when recognized, say, “Point of order — I can’t hear what’s being discussed.”

True False

1. A vote on hotly contested Agenda Item 5 has passed by a vote of 3 to 2. You were one of the two council members who voted against the item. Later in the meeting you ask for reconsideration of Agenda Item 5, because you have thought of something you believe will convince one of the majority votes to change his or her mind. The mayor rules you “Out of order” and refuses to allow a vote on reconsideration. The mayor’s ruling is:

Correct Incorrect

1. It’s 11:00 p.m. by the time the city council reaches Agenda Item 25. The mayor asks for a show of hands to indicate how many members of the public wish to speak on the item, and 32 people raise their hands. The mayor announces that she will limit each speaker to two minutes each. Can the mayor properly do so?

Yes No

1. Joe makes a motion to hold a council retreat in May, and Mary seconds the motion. Sally then moves an amendment to have the retreat in June, and Fred seconds the motion. Esteban then moves a substitute motion to have no retreat this year, and Fred seconds the motion. The mayor announces that discussion will begin on the motion to amend. Is this the correct ruling?

Yes No

1. On a highly controversial agenda item in a meeting attended by many members of the public, the audience becomes engaged in the discussion and members of the audience applaud in support or hiss in opposition following the remarks of the first speaker who addresses the city council. The mayor states that no vocal expressions of support or opposition will be tolerated at the meeting and asks the public not to applaud or hiss after speakers conclude their remarks. May the mayor do so?

Yes No

1. A member of the city council continually interrupts other council members while they are speaking on agenda items. The mayor refuses to stop the offending council member from interrupting. As a member of the city council, you have the right to make a motion to challenge the mayor's ruling and have your motion voted on by the council.

True False

1. After a very long discussion and debate on a motion you made to approve a street repair schedule, which was duly seconded, you want to move ahead with voting on the item, so you say, "I call for the question." The mayor responds, "OK, let's proceed with the vote on the pending motion to approve the proposed street repair schedule." Did the mayor handle your call for the question properly?

Yes No

1. If the maker of a pending motion accepts a proposed change and incorporates the change into her motion, and the person who seconded the motion also accepts the change, this is called a "friendly amendment."

True False

1. Sam moves and receives a second on a motion to create a seven-member Police Oversight Commission. Mariko moves and receives a second on a motion to make the commission 15 members. Helen moves and receives a second on a motion to create an ombudsman position in lieu of the commission. The mayor schedules discussion and a vote on the third motion (Helen's), which passes. The mayor should then schedule discussion and a vote on the second motion (Mariko's motion).

True False

1. In the middle of a meeting the mayor recognizes Maria, a council member, who moves to adjourn the meeting. Frank seconds her motion. The mayor calls for discussion prior to the vote. Maria raises a point of order and says that the motion should be voted on immediately. Who is correct?

The mayor Maria

Answers to Quiz

1-False. 2-Correct. 3-Yes. 4-No. 5-Yes. 6-True. 7-Yes. 8-True. 9-False. 10-Maria.

DOCUMENTS & RESOURCES

[Strategies for Creating More Collaborative, Effective Councils](#)