

# MEMO

**Date:** October 2, 2020

**To:** Mayor Frentzel and Members of the City Council  
William Brock, City Manager

**From:** Jennifer Teal, Retreat Facilitator

**Re:** Retreat Preparation and Agenda

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My colleague Morgan Daniel and I look forward to being with you on October 10 to establish a foundation for effective governance and to develop a shared vision and priorities for the City of Monroe. The vision and priorities developed by City Council during this retreat will inform the City's Priority Based Budgeting (PBB) initiative and create the basis of a strategic planning framework that will be expanded upon by City staff during a subsequent planning session.

This memorandum serves several purposes:

- Clarify the goals and purpose of the retreat
- Identify what needs to be done to prepare for the retreat
- Share the agenda

## Schedule and Location

The retreat will be held in the Monroe Community Room at 6 East Avenue, from 8:30 AM to 5:00 PM. Accommodations will be made to include Council Members who are participating remotely.

## Preparation

A couple of agenda items will require some preparation by the City Council. Thank you for spending a few minutes considering the following prompts. Feel free to use this packet to brainstorm your individual responses.

## The Future of Monroe

When we open the workshop, we will ask each person to share their responses to the following questions:

- What are three things that are true about Monroe that you hope will still be true in 10 years?
- What are three things about Monroe that are not true today but you hope will be true in 10 years?

| What are three things that are TRUE TODAY about Monroe that you hope will still be TRUE in ten years? | What are three things about Monroe that are NOT TRUE TODAY, but you HOPE will be TRUE in ten years? |
|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
|                                                                                                       |                                                                                                     |

## Expectations

We enter every relationship, interaction, and conversation with certain expectations. Those expectations are typically based on unspoken assumptions about how the other person will respond to us. The purpose of this exercise is to articulate – and say out loud – what we expect from one another.

As you consider this prompt, it is important to say both those expectations you have that are already being met and those expectations that you hope are shared among the members of the governing body.

Please take a few minutes to consider your relationship with your City Council colleagues and the City Manager and what you expect from each.

| What expectations do I have for my colleagues on the City Council?<br><br>What do I need from my Council colleagues in order for me to be an effective Council member? | What am I willing to give my colleagues? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
|                                                                                                                                                                        |                                          |

| What expectations do I have for the City Manager?                                               | What am I willing to give the City Manager?                                      |
|-------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| What does the City Council need from the City Manager in order for the Council to be effective? | What do I think the City Manager needs from me in order for him to be effective? |
|                                                                                                 |                                                                                  |

## Priorities

Please think about the important initiatives that you want the City to pursue in the coming year. You will have the opportunity to share individual priorities during the retreat. We will work together to identify the collective energy and interest of the body concerning all the priorities identified.

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## Strategic Planning in Monroe

At its most basic level, a strategic plan exists to answer three questions:

- What do we know to be true today?
- Where do we want to be in the future?
- How can we get there?

Typically, a strategic planning framework includes some combination of the following elements:

- **Vision** – the Vision Statement is aspirational, intended to reflect what you hope will be true for Monroe in the Future.
- **Mission** – the role and purpose of city government, frequently expressed in statements about “who we are, what we do, and why we do it.”
- **Values** – organizational values guide behavior, whether stated or unstated, and are observed when the workforce is “at its best.”
- **Strategic Priorities or Critical Success Factors** – those “things that must go well” in order for the City of Monroe to be successful.

In 2006, a community group consisting of Monroe City Council, Township and School District officials, and neighborhood Homeowner Association representatives developed a strategic vision for the community. This group developed six interconnected vision areas, within each of which were goals designed to achieve the community’s vision. Since then, these priority areas have been revisited periodically by Council and the City Manager, and in 2019, a seventh vision area was added. These vision areas are provided for reference on the following page.

Recently, the City of Monroe adopted the Priority Based Budgeting (PBB) framework, which is based on the idea that resources should be allocated according to how effectively a program or service achieves the goals and objectives that are most important to the community. At the core of PBB is a common understanding of an organization’s vision for the future and strategic priorities.

During our time together, we will work to develop clarity and consensus on the Council’s vision for the City of Monroe and review and affirm the strategic priorities that will serve as the foundation of the City’s PBB efforts and strategic planning framework.

## City of Monroe Vision Areas

The City's ideal future consists of seven interconnected vision areas. Under each vision area are goals, which, if reached, will help the City bring that vision to reality.

### **PRIDE OF PLACE: A MONROE TRADITION**

*(Property Maintenance, Green Space, Streets, and Public Amenities)*

Monroe has a history of determination, perseverance, and foresight. The people of Monroe have worked together through good years and bad, for a steady and continued betterment for all who live here. We seek to honor and learn from the past but focus on the future. Monroe will seek to maintain a welcoming attitude while keeping our small-town feel. The quality of the physical components of a community, both public and private, encourages community pride: Attractive amenities, green spaces, and gathering places make people proud of where they live, and that will also be reflected in their personal property. We will maintain standards, both public and private, which support these beliefs.

### **RESPONSIVE AND CARING SERVICE DELIVERY**

Our Fire Department will continue to be known for its responsiveness, friendly people, and performance. Our Police Department is committed to meet the challenge of an increased population. Our Public Works Department will maintain its focus on infrastructure management and growing our park spaces. Our Administration is committed to being available, responsive, caring, and supportive. We encourage all Monroe employees to be friendly and welcoming, which mirrors Monroe citizens.

### **MANAGED GROWTH AND DEVELOPMENT**

Strategic and diverse residential growth. An enhanced town center, which serves as the heart of the community. Managed infrastructure. A commitment to maintaining strong zoning controls and positive economic development that will support population needs.

### **COMMUNITY ENGAGEMENT**

Involvement with our residents that goes beyond community events. We will build diverse media and means to communicate with citizens, community groups, and businesses effectively. We will be engaged in the larger community by seeking continued partnerships with our neighboring communities.

### **FISCAL RESPONSIBILITY AND STABILITY**

The City has laid a foundation for continuing financial stability. Other components of this vision, such as growth management and community engagement, support this commitment to remain stable.

### **EXCEPTIONAL SCHOOLS**

Great schools are a foundation of a healthy community. This community created the Monroe Local School District in 2000. We support their mission. We want to foster its growth and continue a strong tie between our organizations.

### **INVEST IN EMPLOYEES**

The City Employees are the foundation for the City's success. We support a skilled organization through professional development and training, suitable working conditions, and equitable compensation and benefits. We value our employees and commit to provide the resources they need to deliver exceptional services to our residents.

## Retreat Norms

- Listen with respect
  - Let others finish before you start talking
  - Be attentive to the speaker
  - Disagree agreeably
- Be:
  - **BOLD**
  - Positive and realistic
  - Candid and honest
  - Patient and self-aware
  - Engaged and fully present
- Strive for consensus
  - Look for opportunities to agree
  - Remember the power of “if” and “and”
- Have fun!

## Retreat Agenda

City of Monroe, Ohio  
October 3, 2020  
8:30 AM to 5:00 PM  
Monroe Community Room – 6 East Avenue

### Introductions

- Welcome and introductions
- Agenda review
- Norms and expectations for the retreat

**Agenda Item Outcome:** Create a safe environment for an honest exchange of ideas.

### Operational Update

- The City Manager will provide a brief operational update to set the stage for this planning session.

**Agenda Item Outcome:** Create a shared understanding of the City's current operating environment.

### True Today – True in Ten Years

- Each participant will be asked to share their response to the following questions:
  - What is true about Monroe today that you hope will **still** be true ten years from now?
  - What is not true about Monroe today that you hope **will** be true ten years from now?

**Agenda Item Outcome:** Imagine a bold future for the community.

### Expectations

- Each participant will be asked to share their responses to the prompt questions about expectations that they have for one another and the City Manager to develop a social contract around expectations.

**Agenda Item Outcome:** Gain an understanding of what each person expects from the other and a commitment to meeting your colleagues' reasonable expectations.

### Vision Statement

- We will work with City Council's responses to "True Today – True in Ten Years" to explore the common elements of Council members' vision for the future of Monroe.
- We will discuss the concept of drafting an overarching city vision to which all city priorities and goals would aspire.

**Agenda Item Outcome:** Develop a shared vision of Monroe's future and identify the necessary elements of a single vision statement if one is desired.

### Strategic Priorities

- We will review the existing vision areas through the context of setting clear strategic priorities to guide PBB efforts, editing and updating as required.
- We will ensure that these strategic priorities adequately answer the question, "What must go well in order to achieve the vision for the community?"

**Agenda Item Outcome:** A strategic planning framework that supports the PBB initiative.

## Individual Priorities

- Each member of the City Council will be asked to share with their colleagues the three most important policies or initiatives they wish to accomplish while serving on the City Council.

**Agenda Item Outcome:** Understand one another's interests in advancing their priorities.

## Parting Thoughts

- As the retreat comes to a close, each participant will be asked to share a parting thought on how they feel about the work done during the retreat.

**Agenda Item Outcome:** Closure for our time together.

## Adjourn – 5:00 PM