



# City Council Planning Retreat Summary Report

**May 3 - 4, 2009**  
**Stone Mountain**  
**Evergreen Conference Center**

*Facilitator, Gordon Maner*



Carl Vinson **Institute of Government**

The University of Georgia



May 6, 2009

Dear Mayor Lockwood, and Council Members D'Aversa, Hewitt, Lusk, Tart, Thurman and Bailey,

First of all let me say what a pleasure it was to work with the Mayor and Council at your 2009 planning retreat earlier this week at Stone Mountain. You are to be commended for your thoughtful deliberations regarding the future of your city. I appreciate the strong convictions each of you has for your city and the passion you have for creating a city of distinction.

As you move forward, I offer the challenge of continuing to place more authority in the capable hands of your Manager, Chris Lagerbloom, and allow him to manage operations and particularly the responsibilities of managing the contracts with your partners. Each of you are clearly wanting only the best and most responsive services possible, but another challenge will be to continue that in vein but being patient and understanding that serving a population of 30,000 residents is no easy task especially for a city still in its infancy with so few full time city staff fully committed to the City. I also challenge you to move deliberately in transitioning to the city providing some services currently being provided by a contractor understanding and keeping in mind the current fiscal and capacity limitations. All transitions are times when things can get confusing and frustrating for all involved and patience will be needed along with really good communications; both internally and externally. No doubt the City of Milton is destined to greatness and I will continue to look for good news coming from the City of Milton.

I think it will also be important to regularly revisit the list of needs and expectations of each other you identified as being required for the Council to be successful – those items you listed don't come easy but can be lost instantly so I encourage each of you to visit the list regularly and self assess your own and your councils' success and take time to appropriately address those times when the expectations and needs are not being met

This document serves as my summary report of the deliberations of the City of Milton May 3 - 4, 2009 planning retreat. We at The Carl Vinson Institute of Government appreciate you choosing us to help you with your planning efforts. I hope we have the chance to serve you again in the near future. If you wish to have a facilitated follow-up session in the fall as seemed to be consensus, feel to call and allow us to assist.

Sincerely,

Gordon Maner, Manager  
Local Programs

cc: Chris Lagerbloom, City Manager



# City Council Planning Retreat



**May 3 – 4, 2009 Stone Mountain Evergreen Conference Center**

## Sunday, May 3

8:30 – 9:30	Travel to Stone Mountain Evergreen Conference Center
9:30 – 9:45	Welcome, introductions and overview <i>Continental breakfast will be available in the meeting room</i>
9:45 – 12:00	Getting the most out of the Mayor and Council and Staff
12:00 – 1:00	Lunch
1:00 – 3:00	Roles and Responsibilities: council - staff dynamics
3:00 – 5:00	Priority Setting and begin discussion of issues, goal setting and work plan development
6:30	Dinner

## Monday, May 4

8:30 – 10:00	Continue discussion of issues, goal setting and work plan development
10:00 - 10:15	Break
10:15 – 12:00	Continue discussion of issues, goal setting and work plan development
12:00 – 1:00	Working Lunch
1:00 – 3:00	Continue discussion of issues, goal setting and work plan development
3:00 – 3:30	Summary, evaluation and adjourn



## **Needs and Expectations**

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### **Council members need or expect from each other:**

- Honest and open dialogue – not dance around things
- RESPECT – for differing opinions and perspectives
- Respect for different styles - approaches
- Trust and trustworthiness
- Better communications and information between council and staff and council person to council person
- Work at being more decisive
- Better in hearing staff opinions
- Work on not passing judgment on each other
- Unbiased communication
- Value viewpoints but recognize importance of each person's perspective
- Truthful and fact based decision making
- Indulgence and attentiveness
- Make expectations clear
- Respect staff opinions
- No back stabbing
- Respect each other's time
- Better and consist sharing of information particularly information related financial trends and critical information
- Work hard at trust and respect

### **Council needs or expects from Manager and Clerk?**

- Correct information
- No politics – leave politics to Mayor and Council
- Make expectations clear
- Keep council members informed
- Communication on a regular basis – clearing house for information to be disseminated
- Guidance on things we need to know
- Handle day to day operations
- Staff stand firm to decision of council
- Candid advice – tell me what I need to hear not what I want to hear
- Follow up on requests
- Staff serves the whole body
- No surprises
- Give us advice on efficiency

**Manager needs or expects from Council:**

- Honest feedback – tell me what I need to hear
- A portion of each council members time every 2 weeks
- Please don't bring politics to staff
- Need a central point of direction – Mayor
- Don't jump to conclusions with me when you hear something
- Don't jump to conclusions with when you hear something from citizens
- No surprises

**Clerk needs or expects from Council:**

- Openness
- Share ideas
- Communications – let me know if you're not getting what you need
- No surprises

## **Issues Discussed and Action**

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*(Priority for discussion)*

### **Evaluation/Revision of CH2MHill Contract**

- Chris will be city point person representing the Council
- Mayor will appoint a committee to come up with options and work with Chris to negotiate with CH2MHill
- CH2MHill will bring budget reduction numbers to Chris this week
- Current lump sum option no longer viable

### **Permanent City Hall**

- Council consensus to move in direction of creating a city hall – city center complex
- Discuss options in executive session

### **Review Financial Stability of City and Plan for Future**

1. Complete fiscal review, including 5 year projections and evaluating retirement plan.
2. Financial stability long-term.
  - Finance director/treasurer in place (*Jun 15, 2009*)
  - Short term – Chris bring recommendations to council (*June 1, 2009*)
  - Create 5-year finance, infrastructure and staffing projections complete with model options (*dependent on comp plan completion*)
  - Follow up retreat in the fall of 2009 to review a manager-revised current work plan (*November 2009*)
  - Re-assess committee structure, roles and responsibilities of committees and committee members – clear expectations as well as assessment of staff roles and responsibilities with committees - Manager bring assessment and recommendations to Council (*January 2010*)

### **Parks and Recreation**

1. Establish parks and recreation.
2. Master plan for parks and recreation.
3. Parks and recreation development.
4. Develop the trail and parks system through implementation of a parks authority.
5. Plan for parks and recreation, both active and passive.

- Council meet with parks and recreation committee in informal work session to create a vision for recreation and task staff/consultant with moving the vision to action  
*(Schedule meeting May - June time frame)*

### **Comprehensive Plan Completion**

1. Completion of the Comprehensive Plan.
2. Completion of a reasonable Comprehensive Plan.
  - In process and on schedule *(December 31, 2009)*
  - George provide regular updates to Council *(monthly updates)*

### **Communications/Community Outreach**

1. Ensuring safety and health of our citizens including police and fire and a city wide neighborhood watch program.
2. Improve communication both internally and externally, between Council and staff and City and citizens.
3. Be proactive in all areas.
4. Be swift, yet complete on all actions and decisions.
5. Move to more quality of life issues for our City.
6. Continue to reach out to citizens and engage them on government.
  - Discussion only

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### **Did Not Specifically Discuss:**

#### **Other Responses Not Similar to Others**

1. Sewer delivery area finalized with Fulton County.
2. Balancing economic growth with our vision of keeping the city rural and equestrian including fair treatment of developers, adherence to the law, and a comprehensive tree ordinance.
3. Library location.
4. With a great vision, create a unique proposition for the City utilizing the “equestriancentricness” of Milton.
5. Development of Crabapple.
6. Develop a plan and specific identity for the Highway 9 area.

### **Transportation Plan Completion**

1. Transportation Plan Completion
2. Transportation Plan Completion