



# memorandum

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April 4, 2023

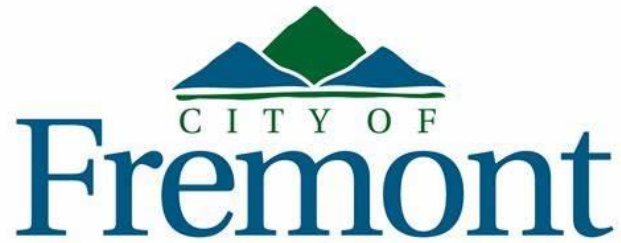
To: Karena Shackelford, City Manager

From: Susan Gauthier, City Clerk

Re: **Correction to Fremont Council Retreat 2023 Report, Agenda Item 6.B Attachment b.**  
Acceptance of the 2023 City Council Retreat Report and Identified Council Priorities

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Table 2 on page 16 of the Fremont Council Retreat 2023 Report entitled **Council's Top Priorities for FY 2023-24** erroneously states that "Improve the Council Culture" received 2 votes. This should be corrected to reflect that "Improve the Council culture" received 0 votes and "Environmental sustainability" received 2 votes.



**City of Fremont  
City Council Retreat  
Held February 28, 2023**

**March 2023**

## Table of Contents

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<b>Retreat Report .....</b>	<b>1</b>
Executive Summary .....	1
Retreat Overview .....	4
Welcome and Opening Comments .....	6
Icebreaker .....	7
Themes from Council Interviews .....	7
Refresher on Good Governance.....	8
Council Norms and Protocols .....	12
Setting the Context for Priority Setting.....	14
Developing Consensus on Priorities.....	15
Staying on Course with Priorities .....	16
Wrap-up and Next Steps .....	2

## Retreat Report

Fremont held a City Council retreat on Tuesday, February 28, 2023 from 9:00 a.m. to 3:00 p.m. at the Downtown Event Center. The retreat provided an opportunity for Councilmembers to discuss teamwork and norms for working together and set priorities for the coming fiscal year. This report contains a summary of the results of the retreat.

Jan Perkins and Magda Gonzalez with Baker Tilly facilitated the retreat.



### ***Executive Summary***

The Council agreements that were reached during the retreat are provided below.

***Priorities:*** The Council consensus was to continue with the same three priorities established in February 2022. Those are:

- Focus on public safety
- Continue to address homelessness
- Foster the viability of commercial corridors

***Council Norms:*** The Council agreed to take the following steps.

***1. Ask questions by noon the Monday prior to Council meetings.***

Councilmembers understand the importance of getting their questions to staff in advance of Council meetings to provide for orderly meetings, be respectful of their colleagues' time, and allow staff to properly prepare and then present answers in an efficient and thorough manner. This is consistent with the "no surprises" rule and shows respect for the City's professional staff.

As a result of this discussion, **Councilmembers agreed to provide staff with their questions by noon on Monday.** This would be the case for the majority of questions. It does not preclude them asking questions at the

Council meeting even if they have asked staff in advance (when asking the question in the public setting will be helpful to the public). It was also understood that when a Councilmember knows they have a last-minute question, they give the City Manager a heads-up so staff can be prepared at the meeting. This also respects the “no surprises” rule. The City Manager encouraged Councilmembers to contact her if they would like more background information on any particular agenda item.

2. **Employ techniques to resolve differences and to respect the team.** To resolve differences and respect the team, the Council agreed to employ the following practices:
  - Address problems/issues one-on-one with colleagues.
  - When one-on-one engagement is not acceptable to one party, then the Councilmembers will engage a mediator to help them address the problems between themselves.
  - Councilmembers will not speak ill of their Council colleagues to others, as it is understood that doing so reflects poorly on the entire Council and is counterproductive to the team.

*Note: During the Council discussion when a poll of the Council was taken on item 2, six of the seven indicated their agreement, with Councilmember Cox dissenting. After the workshop was concluded, Councilmember Cox informed the facilitators that she had changed her position and would support the process outlined.*

3. **Limit Council referrals.** To focus staff time on adopted Council priorities and critical City services, Council agreed to limit their referrals. The City Manager will apply best practices for new initiatives in providing advice to Council (see below). Further agreements include the following:
  - The referral should clearly and concisely state the purpose and the public interest to be advanced by the referral.
  - The referral will contain factual statements, which City staff can confirm or correct as needed. The City Manager and City Attorney can help with historical information.
  - The City Manager and City Attorney will be utilized for advice on proposed referrals.
  - Referrals should not be brought forth on items that have previously been the subject of a referral and have been addressed.
4. **Limit proclamations and recognitions.** The existing policy will remain in effect. Additionally, Councilmembers agreed to limit proclamations and recognitions, understanding that it takes time away from adopted Council priorities and staff’s ability to provide core City services.
5. **Follow Council norms.** The Councilmembers reaffirmed the existing norms articulated in the City Council Handbook. The norms highlighted were:
  - Be mindful of how Councilmember conduct can promote or hamper teamwork of governing. (Norm 2)

- Councilmembers will listen to one another, communicate respectfully with each other and seek to understand each other. (Norm 4)
  - Maintain confidentiality of confidential matters. (Norm 8)
- 6. Follow adopted protocols with modifications.** The Council agreed to follow the adopted protocols, with two modifications, as described below. The complete new language is shown, following the norms, in a subsequent section of this report.
- Protocol three pertains to Councilmembers reporting on their committee assignments. This was expanded to request that as a courtesy, when a Councilmember attends a regional or other meeting as a City representative, they inform their Council colleagues and the City Manager.
  - Protocol five pertaining to visits from foreign dignitaries: When Councilmembers plan to attend an event with or plan to meet with foreign dignitaries, they will let their Council colleagues and the City Manager know ahead of time, out of courtesy.
- 7. Respect the role of the Mayor.** The Council discussed the role of the Mayor in several contexts. Key points that need stating included:
- The Mayor runs the meeting, calls on members of Council and determines the order of speaking, and enforces procedural items. There was some discussion about a problem with the button used by Councilmembers to signal their desire to speak. Staff is following up to determine if there is a technical problem or whether additional training is needed for Councilmembers.
  - The Mayor determines recognitions and proclamations, following the City Council's established policy.
- 8. Follow Council meeting rules.** Councilmembers agreed not to speak out of order, to take turns, with the Mayor calling on them to speak, as is her role. Council further agreed to make clear motions with the aim of avoiding modifications to the motion. The goal should be to make a motion that captures the consensus of the Council. Councilmembers also agreed that each person does not need to speak on every item, or to restate what they already have said on an item. They can say they concur with previous speakers and not repeat.
- 9. Overall commitments agreed to.** The Council agreed to the commitments slide which included the following five items:
- Carry out our respective roles (each in our own lanes).
  - Follow our agreed upon norms and protocols.
  - Contribute to the collective success of the Council, rather than focus on individual interests.
  - Respect the chain of command and use established processes.
  - Participate in regular training and professional development.

## Follow-up by Staff

It was agreed that staff would follow up on the items listed below.

- Consider a more focused public meeting exclusively related to the budget.
- Consider how to provide more advanced information related to major agenda items, including discussing at regular Council briefings.
- Review technology policy regarding the use of tablets, laptops, and other devices during public meetings and closed sessions.
- Implement new process for reviewing Council referrals.
- Track past Council referrals.
- Determine if the “buttons” in the Council chamber used by Councilmembers to indicate their desire to speak are working properly.



## Retreat Overview

### Objectives

- Create consensus about teamwork and norms for working together,
- Review some current trends, and
- Establish Council priorities for FY 2023-24.

### Agenda

- Welcome and call to order by the Mayor
- Public comments
- Comments from the City Manager
- Icebreaker exercise
- Discussion on roles, norms, and protocols
- Lunch break
- Set the context for priority setting
- Discuss and create consensus on Council priorities
- Staying on course with the priorities
- Wrap up and next steps

## Participants Mayor and Council

**Mayor  
Lily Mei**



**Vice Mayor  
Teresa Keng**



**Councilmember  
Desrie Campbell**



**Councilmember  
Jenny Kassan**



**Councilmember  
Yang Shao**



**Councilmember  
Raj Salwan**



**Councilmember  
Teresa Cox**



## Executive Staff

- City Manager Karena Shackelford
- City Attorney Rafael Alvarado
- Assistant City Manager Christina Briggs
- Assistant City Manager Brian Stott
- Assistant to the City Manager Allen DeMers
- Director of Communications and Legislative Affairs Geneva Bosques
- Human Resources Director Tina Gallegos
- Fire Chief Curtis Jacobson
- Public Works Director Hans Larsen
- Management Analyst Candice Rankin Mumby
- Finance Director Dave Persselin
- Community Development Director Dan Schoenholz
- Human Services Director Suzanne Shenfil
- Information Technology Director Sandy Taylor
- Police Chief Sean Washington
- Community Services Director Suzanne Wolf



## Workshop Ground Rules

At the start of the workshop, Jan suggested several ground rules to help the group have a successful workshop. She emphasized the need to assume good intent and work together on behalf of the community of Fremont. Jan also suggested that they *leave the retreat better than when they came in*.



- *Listen with intent to understand, not to respond*
- *Seek consensus*
- *Assume good intent*
- *Examine self*

## Workshop Preparation

In preparation for the workshop, Jan held interviews with each Councilmember and discussed workshop objectives with the City Manager. Jan and Magda prepared an agenda and PowerPoint presentation, along with handout materials to guide discussions during the session.



## Welcome and Opening Comments

The retreat began with a welcome and call to order from Mayor Lily Mei. She invited members of the public to speak.

City Manager Karena Shackelford then offered opening comments about why the retreat was important, and what she hoped the group would gain from the day's discussions. Karena explained that the way Council and staff work together is critical to the success of the team on behalf of the community.

The City Manager turned the session over to the facilitators, who reviewed the workshop agenda, objectives, and ground rules for a successful session.

**Bike Rack**

Jan explained that items that were brought up but would not be discussed today would be added to a bike rack for future attention. The one item that was added to the bike rack is described below.

- Information on past Council referrals so Councilmembers can understand what has been asked previously and the disposition of those requests.

**Icebreaker**

Magda led the group in an icebreaker exercise. The purpose was to begin the workshop informally and to learn more about each other. Each person was asked to share with the group someone who inspired them in the past or who inspires them now. Participants took turns sharing the attributes of the people who they admired. The themes that emerged from this exercise are presented in Figure 1 below.

*Figure 1. Attributes that Are Admired*

Good listener	Cares about relationships	Caring	Charitable	Collaborative	Committed
Continuous development	Courageous	Effective	Empathetic	Hard working	Kind
Leads by example	Open	Patient	Positive	Respectful	Respected
	Self-reflective	Supportive	Trailblazer	Uniter	

**Themes from Council Interviews**

Jan reviewed the themes that emerged from the Council interviews pertaining to their hopes for the retreat. Themes about what they hope to accomplish are summarized below.

- **Agree on what is appropriate behavior** among ourselves; the election is over; move on
- Commit to **treating each other with dignity and respect**; be able to fervently disagree but treat each other with civility
- Understand the dynamic between building strong relationships with one another **and how that communicates to the public**; stop the unprofessional behavior

- Be professional, move forward; **deal with problems with each other on a one-on-one basis**, not in the public arena
- Become a **more unified City Council**, commit to air differences in a **constructive manner**, agree to treat each other with respect
- Agree on how we will **work together in a respectful manner**, following our protocols **in and out of meetings**



### Refresher on Good Governance

Following the discussion of themes that emerged from the interviews Jan and Magda provided a brief refresher the importance of effective governance and best practices that make Councils work well. They noted that Council teamwork affects how the City is perceived, and shared factors that **help** and **hinder** governance. Magda presented consequences of a dysfunctional Council, which are listed in Figure 2 below.

Figure 2. Consequences of Council Dysfunction



### Issues for Discussion

Jan reviewed the issues for discussion suggested by Councilmembers during their individual interviews. These five issues, and a summary of the discussions that followed for each, are presented in Table 1 below.

Table 1. Discussion Items Suggested by Councilmembers

Item	Summary of Discussion Points
<p><b>Being prepared for Council meetings</b></p>	<ul style="list-style-type: none"> <li>• Discuss more meaty items during Council briefings</li> <li>• Interest in seeing “draft agenda” of upcoming items and having the city manager meet with Councilmembers to talk through those items</li> <li>• Can Councilmembers get agendas earlier?</li> <li>• Ask questions of city manager when you see an item on tentative agenda, as needed</li> <li>• Timing of when presentations are distributed</li> <li>• Can links to previous Council agendas on the same item be shared?</li> <li>• More lead time on budget, CIP and other big items; we may need a study session ahead of action meeting, which allows for more time to deliberate</li> <li>• All Councilmembers should commit to providing questions to staff by noon on Monday</li> </ul>
<p><b>What does it mean to be respectful of each other?</b></p>	<p><b>Practice Effective Communication</b></p> <ul style="list-style-type: none"> <li>• Recognize those who have their hand raised, in proper order and with equal time to speak</li> <li>• Don’t push the button more than once because it puts you to the bottom of the queue</li> <li>• Don’t repeat what other Councilmembers already said</li> <li>• If speaking again on same item, say something new</li> <li>• Listen to mayor’s prompt – i.e., questions vs. comments</li> <li>• Ask questions in advance</li> <li>• Must be clear and concise; do not be misleading</li> <li>• Do not share confidential information</li> <li>• Be factual in statements; use factually based information</li> <li>• Don’t share emails</li> <li>• Honest feedback</li> <li>• Conversation is healthy</li> </ul> <p><b>Respect Roles and Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Understand the role of Mayor is to preside over meetings and ceremonial events; or the Vice Mayor if Mayor is absent</li> <li>• Councilmembers should not try to run meeting when they are frustrated</li> <li>• Be respectful of each other’s’ family members</li> <li>• Determine how to improve the Referral Process; Seek advice from the city manager and/or city attorney before bringing forward a referral</li> </ul> <p><b>Show Respect</b></p> <ul style="list-style-type: none"> <li>• Assume good intent</li> <li>• Respect each other’s time and time of staff and community</li> <li>• Criticizing fellow Councilmembers in public is not productive</li> <li>• Treat all Councilmembers equally with respect, especially in public</li> <li>• Respect each other in all arenas: at Council meetings in all public domains, on social media</li> <li>• Focus on policy, not on personalities</li> </ul> <p><b>Dysfunction</b></p> <ul style="list-style-type: none"> <li>• Know that everyone (in the community) talks, especially as it relates to issues between individuals on the Council; deal with these issues one-on-one</li> <li>• Don’t suggest motives of others</li> </ul>

Item	Summary of Discussion Points
	<ul style="list-style-type: none"> <li>• Deal with each other one-on-one or use a mediator to help facilitate the conversation</li> <li>• Do not speak ill of each other to the public</li> <li>• Be mindful of sharing emails from others out of context</li> <li>• Avoid racial division</li> <li>• Don't attribute values to someone else</li> <li>• People do not want to be around bickering</li> <li>• Avoid "One upping" each other; when one talks, so next one talks more</li> <li>• If an issue has been resolved, move on; don't need to keep bringing it up</li> <li>• Recognize boundaries</li> <li>• Don't stack meetings</li> <li>• If we can deal with these team issues, we can do so much for our community</li> <li>• It is risky to not settle down and be an effective team</li> <li>• Be responsive to each other</li> <li>• Consider the proper place and time for comments</li> <li>• Be respectful of items before us</li> <li>• Don't contribute to race or religion tension in the community</li> <li>• People read things into what they see</li> </ul>
<p><b>Follow established protocols for proclamations and recognitions</b></p>	<ul style="list-style-type: none"> <li>• Mayor is the enforcer of procedural items</li> <li>• Potentially clarify referral process in the Council Handbook</li> <li>• Interest in clearly stating the purpose of the referral</li> <li>• Not necessary for Councilmembers to speak after the Mayor reads the proclamation</li> <li>• Proclamation and recognition process was updated in September 2022</li> <li>• Should focus more on core work of the City versus ceremonial items</li> <li>• Clarify required timing of submittals</li> <li>• Interest was expressed in streamlining the process</li> </ul>
<p><b>Follow meeting rules</b></p>	<ul style="list-style-type: none"> <li>• All Councilmembers agreed not to speak out of order               <ul style="list-style-type: none"> <li>○ Agreed to use the button to speak</li> <li>○ The Mayor presides over the meetings and it is the Mayor's responsibility to call on Councilmembers to speak</li> </ul> </li> <li>• Make sure motion is clear to avoid modifications</li> <li>• Deliberation is very long and often repeated</li> <li>• Try to make a motion that captures Council's consensus</li> </ul>

### Roles

The role of the Mayor was discussed at various points in the morning discussion, and there was consensus that the Mayor's role should be respected. The Mayor's role includes presiding over and facilitating Council meetings, calling on Councilmembers to speak, representing the City at ceremonial and cultural events, and determining which proclamations will be brought forward at a Council meeting.

### Asking Questions in Advance of Council Meetings

The importance of Council asking staff their questions before the Council meetings was discussed. This helps staff be prepared, is respectful of staff, helps

to avoid surprises, aids in the efficiency of the meetings, and allows staff to provide as much information as possible so Councilmembers can make an informed decision.

The City Manager requested that Councilmembers send questions by Monday at noon, so staff has time to provide responses to the entire Council.

Discussion comments included:

- City Attorney noted that it is important to get Councilmembers' Fair Political Practices Commission (FPPC) questions in advance as he is not necessarily able to answer on the spot during the meetings.
- Questioning of staff that comes across as "hammering" makes staff feel unappreciated and undermined.
- When questions are asked in advance, staff will provide the answers to the entire Council.
- The City is an employer and there is a need to be mindful of the work environment being created.

### **Discussions During Council Meetings**

It was noted that in discussing an item, it is appropriate and acceptable for a Councilmember to be silent if they agree with what has already been said on the item. Further, it was noted that active discussion is needed on certain items so the community can see that the Council is taking the item seriously.

One of the slides in the PowerPoint contained tips for promoting civility in meetings from the Institute for Local Government (ILG). The tips are:

1. Embrace **different** points of view.
2. **Everyone** gets a chance to share their views.
3. With rights come responsibilities; respect **time limits and protocols**.
4. **Avoid** debates and interruptions.
5. **Reduce uncertainty**; assure people they will get a chance to be heard; follow protocols.
6. **Listen** as a sign of **respect**.
7. **Do not allow** heckling and applause.
8. **Attack the problem** not the person (separate people from the problem).
9. Consider using **titles** (Councilmember..., Mr., Ms., Dr., etc.).
10. Take a **break** if things get heated.



### ***Council Norms and Protocols***

The next segment of the retreat focused on reviewing and discussing the Council norms and protocols (which were last reviewed in February 2022). The purpose of this discussion was to agree on ways Council can work together productively.

#### ***The 11 Council norms are listed below.***

1. Maintain a citywide perspective, while being mindful of districts.
2. Be mindful of how Councilmember conduct can promote or hamper teamwork or governing.
3. Councilmembers will acknowledge that Council actions/ decisions represent City policy once a decision is made.
4. Councilmembers will listen to one another, communicate respectfully with each other and seek to understand one another.
5. Find consensus with Councilmembers when possible; find areas of agreement within the areas of disagreement.
6. Respect other Councilmembers' opinions.
7. Never assume intent regarding other Councilmember actions.
8. Maintain confidentiality of confidential matters.
9. Respect the roles of Mayor, Council and staff in creating policy and in implementing policy.
10. Respect the Council/manager form of government.
11. Communicate concerns about staff to the city manager. Do not criticize staff in public.

After reviewing the 11 norms, Council gave a “thumbs up” that they agreed with all the norms and committed to follow them.

## Protocols

The Councilmembers reviewed their eight adopted protocols, which are listed below. Changes were made to two of them, as noted.

1. Craft clear Council motions so that staff and Councilmembers all understand what is intended.
2. Seek to be efficient in comments at City Council meetings.
3. Provide reports and other information to City Council colleagues and staff about committee assignments in written summary format and/or at City Council meetings under Councilmember communications, especially when something is time sensitive. **ADDED: As a courtesy, when a Councilmember attends a regional or other meeting as a City representative, they are to inform the Council and the City Manager.**
4. Participate in the League of California Cities, National League of Cities, US Conference of Mayors and other organizations that relate to City of Fremont work in order to enhance personal professional development as governing body members, and to learn about new approaches and common issues being addressed by other local governments.
5. When foreign dignitaries request official City of Fremont events with members of the Council in the Councilmembers' official capacity, courtesy invitations should be extended to all members of the City Council. **ADDED: When Councilmembers plan to attend an event with or plan to meet with foreign dignitaries, they will let their Council colleagues and the City Manager know ahead of time out of courtesy.**
6. During Council campaign seasons, the City Attorney will remind Councilmembers about their obligations and limitations, including prohibitions on use of any City resources, including but not limited to, City equipment, City employees, City logo or other official City designations in campaign literature, signs, social media or other communications.
7. Refrain from using technology to communicate with others during City Council meetings.
8. Refrain from using the City's logo or any photos with City staff in ways inconsistent with City laws and policies.



## Setting the Context for Priority Setting

The senior leadership team joined for this part of the retreat.

### Accomplishment and Challenges

Recent accomplishments and challenges were highlighted. The purpose of this discussion was to both celebrate the City’s successes and progress, while being mindful of the challenges faced. The following slides were presented.



- Financial health
- Local business revival, added new businesses
- Downtown Event Center
- Housing Navigation Center, Mobile Evaluation Team, safe parking program
- Affordable housing projects
- Focus on public safety
- Completed the Housing Element
- Mitigated traffic around schools
- Returned to in-person Council meetings
- Mission Peak lease
- Infrastructure improvements
- Grants for parks, trails
- Teen Center
- Launched community engagement platform
- Housing finance award


37


Key Challenges




**Potential recession**




**Increased traffic**




**Maintaining core City services, infrastructure**




**Recruitment and retention**



**Crime**




**Homelessness**



**Lack of vibrancy in commercial areas**



**Governance**


38


### Trends in Local Government and Financial Outlook

City staff presented the City’s financial outlook and key trends in local government that are relevant to Fremont. The three trends that were discussed were significant competition for talent, increases in PERS and other costs, and increasing cybersecurity risks. The Human Resources Director pointed out that the City currently has a 10% vacancy rate.

## Developing Consensus on Priorities

The three Council priorities that were set in February 2022 are shown below, with a foundational financial principle.

### Foundational Principle

*Ensure the financial health and sustainability of the City of Fremont*

### Priorities

-  Focus on public safety
-  Continue to address homelessness
-  Foster the viability of commercial corridors

### Priorities for Discussion

Jan noted that the priorities that emerged from the Council interviews mirrored the 2022 priorities, with some additional items. The following slide shows the priorities.

## Councilmember Items For Priorities Discussion

Objective is to agree on three priorities for key focus for FY 2023 -24

<ul style="list-style-type: none"><li>A. Focus on public safety</li><li>B. Continue to address homelessness</li><li>C. Foster the viability of commercial corridors</li></ul>	<ul style="list-style-type: none"><li>D. Continue to address affordable housing</li><li>E. Mitigate traffic issues</li><li>F. Foster good relationships with schools and colleges</li><li>G. Improve the Council culture</li><li>H. Environmental sustainability</li></ul>
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A, B and C were FY 2022 -23 priorities

44

### Determining Top Priorities

Councilmembers participated in a dot voting exercise to determine their top priorities for FY 2023-24. Each person was given three dots and asked to place them on their top priorities.

The results of this exercise are shown in Table 2 below. **Council decided to roll over the three priorities from last year into FY 2023-24.**

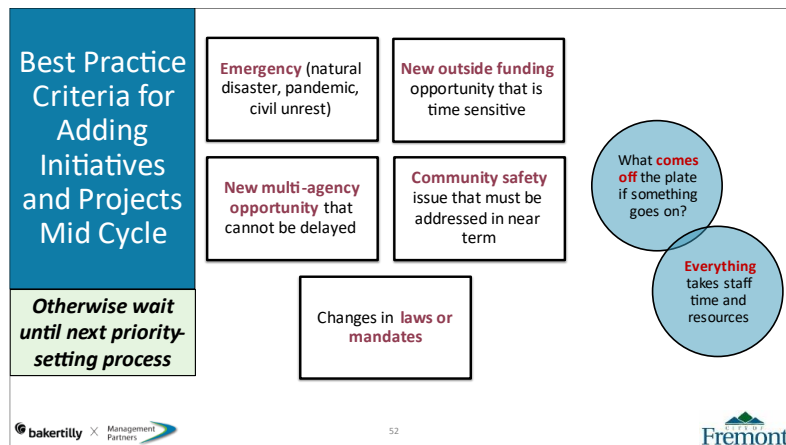
Table 2. Council’s Top Priorities for FY 2023-24

Top Priorities	Votes
Focus on public safety	6
Continue to address homelessness	7
Foster the viability of commercial corridors	5
Continue to increase affordable housing	1
Mitigate traffic issues	0
Foster good relationships with schools and colleges	0
Improve the Council culture	0
Environmental sustainability	2
Ceremonial and cultural events	0

### Staying on Course with Priorities

After the priorities were established, there was a discussion about what would help the Council and staff team stay on track, given the limited staff and financial resources. Staff will align programs, projects, and activities with budget, staffing, and workloads; build priorities into the budget and workplans; and provide periodical updates to Council.

Jan reviewed best practice criteria for adding initiatives and work, suggesting that minimizing Council referrals will be an important way of maintaining staff focus and other resources on established priorities. The best practice criteria are shown in the following slide.



## ***Wrap-up and Next Steps***

To conclude the workshop, Jan explained that Baker Tilly would prepare this summary report, and that that staff would incorporate the priorities into the budget and work plan.

## **Reflections from Council**

To conclude the retreat, Councilmembers, the City Manager, and City Attorney shared comments about what was useful in spending the time together. A summary of these reflections is provided below.

- Being on the same page and bringing us closer together to carry out City services, helpful to hear from others, and gain more clarity.
- Good to reaffirm priorities, a good opportunity to build team spirit, and reminder ourselves we are on the same team with same goals.
- Continue to work on Fremont brand, as well as City priorities.
- We have more in common, than differences.
- Good insight into staff perspectives and each other.
- Nice to break bread and spend time together.
- Tough conversations that go to the heart of the matter and able to share what was on our minds.
- Informative.
- Settled on several things that we have noticed; let's self-reflect, have efficient meeting with civility so we can advance forward.

