

Council Budget Retreats

A Few Things to Consider

When to hold the retreat?

- January/February
 - Usually January is best option
 - Kicks off your budget cycle
 - Need to give yourself time to implement ideas into the budget
 - Mid-Year Retreats- Policy driven or strategic planning

Length of Retreat

- One Day
 - Usually not long enough to cover everything
 - Could be used mid-year to discuss particular issues
- Two Day
 - Maybe not two full days
 - Friday afternoon-Saturday afternoon
 - Need to be sure to keep everyone's attention
- Extended
 - Not recommended unless you have major changes

Who Should Attend?

- Elected Officials
- City Manager
 - Generally is the one that facilitates the retreat
- Department Heads
 - They need to be a part of the process
 - Builds trust with elected officials
- Other Managers
 - Decide if they would have a necessary role; Be careful not to have too many people there
- City Recorder
 - They need to record meeting and take minutes

On-Site vs. Off-Site

- On-Site
 - Less cost
 - Easier access for participants and residents
 - Sometimes participants don't fully engage; distractions
- Off-Site
 - Get out of the “office” to get a fresh perspective
 - Sometimes incurs more cost
 - Recommended option
- Out of Town
 - Full participation (we invited spouses)
 - Definitely more expensive
 - Not a popular option politically

Facilitation

- Elected Official (Mayor)
 - Might want to facilitate to some degree; be sure to check with them
- City Manager
 - Recommended course
 - You will have the ability to steer the meeting as needed
- Outside Facilitator
 - Additional cost
 - Use more for a visioning or strategic planning retreat

Other Items

- Year in Review
 - Present a recap of the past year to celebrate successes
 - Take a minute to pat yourselves on the back
- Social Activity
 - Invite spouses to participate
 - Allows group to gel; don't be cheesy
- Good Meals
 - Cater in good meals
 - Make the experience fun, positive and special