

# 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