

# **Council-Staff Retreats**

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## FOREWORD

This research memorandum reports on the practice being adopted by a number of Washington cities of conducting "council-staff retreats." Drawing from the field of organization development, many municipalities are using council-staff retreats as an effective tool in improving working relationships and communication skills among councilmembers and between council and staff. Council-staff retreats also provide an excellent opportunity for councilmembers and staff to review and discuss current city programs, plan for future needs, and to determine issue priorities.

The report also contains a list of written resource materials (many of which are available from the library of the Municipal Research and Services Center) and copies of several retreat agendas that may be useful in planning and conducting a council-staff retreat.

Special acknowledgement is given to Byron K. Katsuyama, Public Policy Consultant, who is the author of this publication. The work of Mary K. Davis with respect to copy preparation is very much appreciated.

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Executive Vice President  
Municipal Research and Services  
Center of Washington

## COUNCIL-STAFF RETREATS

A growing number of Washington cities have discovered that "council-staff retreats" can play an important role in improving and strengthening working relationships, both within the city council and between council and staff members, and can ultimately lead to a more effective and efficient city council.<sup>1</sup> What is a council-staff retreat? While the topics discussed at a retreat may vary from city-to-city, most of these meetings share several characteristics which set them apart from regular city council meetings:

- \* They are held at a location away from the council chambers (oftentimes away from the city itself), where the participants will be free from normal office interruptions.
- \* They are conducted in an informal atmosphere to encourage an open discussion and exchange of ideas.
- \* They emphasize discussion of broad issues (e.g., goal setting and prioritization) outside of the normal day-to-day concerns of running the city.
- \* They offer council and staff members an opportunity to discuss, analyze and evaluate how well they work together as a team (e.g., council self-evaluation, city administrator/manager evaluations, and role negotiation and clarification) and to seek ways of improving their working relationships.

### Why Retreat?

City councils in Washington have conducted council-staff retreats for a number of reasons. In cities where councilmembers are experiencing difficulties in communicating with one another, a team building retreat may be an effective way to deal with the problem. However, retreats are not just for cities that are having communication problems. Quite the contrary, most cities that conduct council-staff retreats on a regular basis are already functioning quite well, but do so in order to improve their performance even more.

Team Building. Recognizing the importance of being able to work together as a team, some retreats emphasize improving consensus building and communication skills of councilmembers. In addition, the informal atmosphere of a retreat offers council and staff members a chance to get to know one another as people, outside of their formal roles as city officials. This simple process of meeting on equal terms in an informal atmosphere can produce surprising results in the form of increased understanding and mutual respect, improved communications and stronger working relationships. All of these improvements, in turn, can make important contributions toward a more effective city council and staff.

Program Evaluation. Retreats also afford city officials an opportunity to discuss the "big picture" of where they have been, where they are, and where they are going. In

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<sup>1</sup>Washington cities that have conducted council-staff retreats in recent years include: Bellevue, Redmond, Kirkland, Port Townsend, Issaquah, Vancouver, Des Moines, Spokane, Edmonds, Kent, Tacoma, Kennewick, Moses Lake, Pullman, Bellingham, Anacortes and Gig Harbor.

this connection many council-staff retreats include sessions for the purpose of reviewing and evaluating current city programs. These sessions usually involve presentations by department heads together with discussion and feedback by councilmembers.

Goal Setting, Prioritizing and Brainstorming. Another popular retreat topic is goal setting. Goal setting sessions allow council and staff to establish and prioritize short and long range goals and to evaluate progress on previously set goals. The importance of having a set of shared goals to provide a purpose and direction for group action is well established. The retreat environment is also generally thought to be more conducive to the processes of creative thinking and problem solving. Some retreats actually include brainstorming sessions on the agenda as a way for generating and investigating alternative solutions for problems.

Council Self-Evaluation, City Administrator/Manager Evaluation. Many city councils also use council-staff retreats for the purpose of self-evaluation. The object of this type of discussion is to take a self-critical look at the way in which the council functions as a group. Are our internal operating procedures working well? Do we seem to be spending too much time arguing without being able to resolve our differences in constructive ways? Have we been able to accomplish the goals which we have set for ourselves? Why or why not? What can we do to improve the situation?

In addition to taking stock of their own operation, city councils may also take the time to evaluate their city administrator's or manager's performance. The informal atmosphere of a council-staff retreat can make this process go a little easier than might otherwise be the case back in the more formal setting of the council chambers.

Role Negotiation and Clarification. Another subject which may be considered at a retreat that also falls within the context of council self-evaluation and administrator/manager evaluation, is the issue of defining and clarifying official roles and expectations. Much unnecessary conflict, which may hinder effective council-staff performance, can be avoided by taking the time to discuss and reach a consensus on some basic questions concerning the respective duties, roles and responsibilities of all participants. An issue that is often brought up in this context concerns the problem of defining the proper role of councilmembers and staff with respect to policy-making versus administration.

### Who Should Participate?

The list of retreat participants will depend to a great extent upon the type of meeting that is planned. The core group usually includes the members of the city council together with the mayor, city administrator, or city manager. Other individuals such as the city attorney, clerk, or other selected department heads or staff members may also be included.

Since many cities include a review of current programs on their retreat agenda, department heads are often invited to come and make a presentation to the city council and to discuss their programs with the councilmembers. The department heads, in turn, can use this opportunity to get a better understanding of the city council's wishes and intentions with respect to their particular program.

Selecting a Facilitator. Another issue that needs to be considered in planning a retreat concerns the use of a facilitator or discussion leader. This is the individual who will take the lead and moderate the discussion. A question that usually arises is whether to use a professional facilitator who is specially trained in conducting and moderating group discussions or simply an in-house facilitator such as the mayor or city manager. The selection of the right individual for this job is important since he/she will play a key role in conducting and managing the flow of discussions throughout the retreat. The decision on whether to use a professional or an in-house facilitator will ultimately depend upon the individual needs and preferences of the retreat participants. For example, a city council that is conducting their first retreat may want to use the services of a professional facilitator to introduce the group to the retreat format and to lead them through the discussion. In cities where working relationships within the council or between the council and staff are strained and where communication is a problem, using a professional facilitator to act as an intermediary may also be the best way to go. As an outsider, a professional facilitator can be more objective and will be less likely to have any preconceived notions or biases with respect to the retreat participants. Using a professional facilitator also relieves the mayor or city manager from the responsibility of leading the discussion and puts everyone on an equal footing as discussants. Of course, one other item that must be considered in hiring a professional facilitator is the cost. Many cities may be unwilling to pay the price for a professional which typically may run anywhere from \$500.00 to \$2,000.00 for a one or two day retreat.

In those cities that have had some experience in conducting retreats or where council and staff have fewer problems communicating, an in-house facilitator may be all that is needed. There are also plenty of written resource materials available to offer guidance and suggestions as to how to conduct a retreat including information on goal setting, team building, city council self-evaluation, city manager evaluation, program evaluation, strategic planning and other similar topics. (A list of selected resource materials appears in Appendix A at the end of this report.)

### News Media/Citizen Attendance

Since a council-staff retreat will, except in very limited circumstances, be open to the public, members of the news media and citizens may also want to attend.<sup>2</sup> Experience in many cities, however, demonstrates that few citizens actually do attend a council-staff retreat, particularly if one is held at a location away from the city. Members of the news media, on the other hand, are usually more interested in attending. Some cities report that they extend a special invitation to reporters and provide them with an agenda and meeting materials. Noting that the presence of a group of reporters can have an inhibiting effect on the kind of open and frank discussion that is desirable at a retreat, some cities have been successful in convincing reporters to

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<sup>2</sup>Any time a majority of the members of the city council are meeting to discuss city business, the provisions of the Open Public Meetings Act (Ch. 42.30 RCW) will apply. Therefore a council-staff retreat must be open to the public and must comply with the required notice provisions of the act (See RCW 42.30.080). The only exception to the open meeting requirement would be in those instances where the city council is meeting in an executive session to discuss one of the issues which may be legally discussed in an executive session pursuant to RCW 42.30.110.

refrain from directly quoting the participants. Overall, the reaction of local news media to council-staff retreats appears to have been favorable in most cities, although objections are sometimes raised to the idea of holding a retreat at a location away from the city.

### **Timing, Frequency and Length of Retreats**

Questions concerning the timing, frequency and length of retreats are also dependent upon the particular needs and preferences of the city council. Many cities conduct regularly scheduled council-staff retreats (e.g., yearly goal setting retreats) while others hold such meetings only on an ad hoc basis in response to particular issues and problems. Most cities hold retreats on an annual basis, lasting anywhere from one-half to two days and generally over a weekend. The timing of a retreat will depend upon a couple of factors: (1) finding a date that is convenient for everyone to attend; and (2) the type of retreat being scheduled. A yearly goal setting retreat may be more useful if it is held during the summer months sometime prior to the yearly budget preparation process. In the case of a team building retreat, finding a convenient time when everyone can meet may be the only criterion that needs to be considered.

### **Location of Retreat**

One of the most important aspects of a council-staff retreat is the location and setting that is selected for the retreat sessions. Usually some attempt is made to select a site away from city hall where the participants can engage in informal discussion in a comfortable setting without any unnecessary interruptions. Usually the site that is selected is located away from the city, however, some cities do conduct retreats using facilities that are located within the city.<sup>3</sup>

A local resort may provide the most ideal location and setting, and in Washington many of the popular resort hotels have been used as sites for council-staff retreats.

While a secluded resort location may provide the ideal setting, it is not absolutely essential in order to conduct a successful retreat. An important thing to avoid, however, is a location and setting that duplicates the city council chambers. The primary goal is a relaxed and informal atmosphere that will be most conducive to open, uninterrupted discussion.

### **Tips for Conducting a Successful Council-Staff Retreat**

Once you have decided to hold a council-staff retreat it will be necessary to develop a plan establishing a time and location for the retreat, a list of participants, a list of suggested topics and to appoint a coordinator who can make all of the necessary arrangements regarding accommodations, transportation, meals and retreat materials.

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<sup>3</sup>It should be noted that state law requires all city council meetings in third and fourth class municipalities to be held within the city or town limits (see RCW 35.24.180 and 35.27.270 respectively). First, second and optional municipal code cities, on the other hand, do not appear to be similarly restricted and probably do have authority to hold special meetings such as council-staff retreats outside their city limits. Perhaps the best thing to do on this question is to check with your city attorney.

The following list of suggestions may also be worth considering while you are planning for a council-staff retreat:

- \* Develop a clear agenda (see Appendix B which contains sample retreat agendas) for the meeting, but allow for some flexibility to encourage a free flow of discussion.
- \* Get a commitment from all councilmembers to attend the retreat.
- \* Don't try to tackle too much on your first retreat; a one-day goal setting retreat may be a good way to start.
- \* Try to avoid a situation in which staff members outnumber the council; if necessary, rotate staff participants in and out of the retreat.
- \* If you can't go out of town, then try to find a meeting location with a comfortable and relaxed atmosphere, free from interruptions.
- \* Think about using a professional facilitator to help in getting you started.
- \* Plan some social events in addition to the working sessions.
- \* Decide on some action steps at the close of the meeting and implement one or several as soon afterwards as possible.

### Conclusion

Council-staff retreats seem to offer an ideal setting for councilmembers and staff to meet and discuss the internal working relationships of the council-staff team and to focus some attention on such big picture issues as program evaluation, goal setting and issue prioritization. Finding the time to deal with these important issues can be problematical, particularly when there are many day-to-day issues and problems that demand the attention of the city council. Setting aside a special time in the form of a council-staff retreat may be the best way to address this problem.

Most cities that have conducted council-staff retreats have reported favorable results and a high degree of satisfaction on the part of the retreat participants. For a growing number of Washington cities council-staff retreats have become an important tool in improving the efficiency and effectiveness of the council-staff team.

## **APPENDICES**

**A - Selected Resource Material List**

**B - Sample Council-Staff Retreat Agendas**

## APPENDIX A

### RESOURCE MATERIAL LIST: COUNCIL-STAFF RETREATS \*

#### General Council Development

"Council-Manager Retreats," by Christine Schwarz-Becker, Selected Shorts, International City Management Association, Vol. 10/No. 1, January 1978.

"Council Development: Strategies for Increasing City Council Effectiveness," by Fred Fisher, National League of Cities, November 1980.

Group Techniques for Program Planning, by Andre Delbecq, et al., Foresman & Co., 1975.

"Getting Elected is Just the Beginning," by Christine Becker, Public Management, International City Management Association, July 1979, pp. 10-14.

"Elected Officials Retreats: Building an Effective Team," by Jack Azzaretto and Howard Smith, Urban Georgia, May 1984, pp. 35-37.

Elected Officials Handbooks: Practical Aids for Busy Local Officials, 2nd Ed., Vol. I, International City Management Association, 1983.

Elected Officials Handbooks: Practical Aids for Busy Local Officials, 2nd Ed., Vol. II, International City Management Association, 1983.

A Directory of Management Resources for City Councils, by Deborah A. White, National League of Cities, 1978.

Resource Directory of Council Innovations: Sixty-Four Reasons Not to Reinvent the Wheel, edited by Hervey L. Sweetwood, et al., National League of Cities, October 1980.

"Retreat' Helps Lawrence Move Forward," by Marc H. Pfeiffer and Barry Larson, New Jersey Municipalities, March 1987.

Managing With People: A Manager's Handbook of Organization Development Methods, by Jack K. Fordyce and Raymond Weil, Addison-Wesley Publishing Co., 2nd Ed., 1979.

#### Team Building

Team Building, by Tara Hamilton, Local Elected Officials' Handbook Series, International City Management Association, 1979.

Taking Stock: A Guide to Governing Body Self-Evaluation, Local Elected Officials' Handbook Series, International City Management Association, 1977.

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\*Many of the items included in this list are available from the library of the Municipal Research and Services Center of Washington.

Building City Council Leadership Skills: A Case Book of Models and Methods, edited by Stephen W. Burks and James F. Wolf, National League of Cities, February 1981.

Team Building: Issues and Alternatives, by William Dyer, Addison-Wesley, 1977.

"Team Development and Evaluation," by Richard V. Brown, Public Management, May 1976, pp. 8-9.

"Capacity Building and the Elements of Public Management," by Phillip M. Burgess, Public Administration Review, Vol. 35, December 1975, pp. 705-716.

Group Leadership, by Neely Gardner, National Training and Development Service, 1974.

"Team Building in the Local Jurisdiction: Two Case Studies," by William C. Giegold and Richard J. Dunsing, Public Administration Review, Vol. 38, January/February 1978, pp. 59-63.

"Successful Workshop Training of Local Government Officials," by Douglas J. Brunnette, Training and Development Journal, April 1976, pp. 24-27.

"Team Building: A New Life Style for City Council-Administrator Relationships," by Claude J. Klug and Melvin LeBaron, Western City, May 1976, pp. 7-12.

"Team Development Trainers' Workshop," Public Administration Review, March/April 1974, pp. 124-129.

### Goal Setting and Strategic Planning

"Improving the Goal Setting Process in Local Government," by Louise G. White, Public Administration Review, January/February 1982, pp. 77-83.

"Setting Priorities: Three Techniques for Better Decision-Making," Management Information Service Report, Vol. 12, No. 9, International City Management Association, September 1980.

Tools for Leadership: A Handbook for Elected Officials, by Hervey L. Sweetwood, National League of Cities, September 1980.

"Goal Setting: Establishing Directions for the Community," by John Bramble, Colorado Municipalities, May-June 1984.

"Organizational Goal Setting in Local Governments," Management Information Service Report, Vol. 16, No. 5, International City Management Association, May 1984.

"Goal Setting by Officials: The Kansas City Experience," by Bruce B. Morgan, National Civic Review, Vol. 71, No. 6, June 1982.

"A Mission Statement May be the Missing Element in Coordinating the Efforts of Your Local Municipal Government," Illinois Municipal Review, March 1983, pp. 17-19.

Strategies for Cities and Counties: A Strategic Planning Guide, Public Technology Incorporated, 1986.

"Strategic Issue Management: Improving the Council-Manager Relationship," Management Information Service Report, Vol. 18, No. 6, International City Management Association, June 1986.

"Strategic Agenda Management: A Powerful Tool for Government," by Douglas C. Eadie, National Civic Review, January 1985, pp. 15-20.

"Strategic Planning: An Approach to Launching New Initiatives in an Era of Retrenchment," Management Information Service Report, Vol. 14, No. 9, International City Management Association, September 1982.

"Symposium: Strategic Planning" (various articles on strategic planning), Journal of the American Planning Association, Winter 1987, Vol. 53, No. 1, pp. 6-68.

### Chief Administrative Officer Evaluation

Evaluating the Chief Administrator, by Christine Schwarz-Becker, from the Local Elected Officials Handbook Series, International City Management Association, 1977.

"A City Manager's Performance Evaluation Plan," Western City, 1977, pp. 8-9.

"Council Evaluation: State of the Art," by Christine Schwarz, from Public Management, May 1976, pp. 2-7.

"Personnel Appraisals in Local Government," by Charles J. Schwabe, Baseline Data Report, Vol. 18, No. 1, International City Management Association, August 1986.

"Evaluating Employee Performance - A Manual for Local Governments," by M. Peter Scontrino, for the Washington Local Government Personnel Institute, June 1979.

### Program Evaluation

Practical Program Evaluation for State and Local Government Officials, by Harry P. Hatry, et al., The Urban Institute, 1973.

Program Analysis for State and Local Governments, by Harry P. Hatry, The Urban Institute, 1976.

Performance Measurement: A Guide for Local Officials, The Urban Institute, 1980.

"Strategies for Implementing Performance, Measurement," by Charles K. Beus, Management Information Service Report, Vol. 18, No. 11, International City Management Association, November 1986.

Measuring the Effectiveness of Basic Municipal Services, The Urban Institute, February 1974.

How Effective Are Your Community Services? Procedures for Monitoring the Effectiveness of Municipal Services, by Harry P. Hatry, et al., The Urban Institute, 1977.

APPENDIX B

SAMPLE COUNCIL-STAFF RETREAT AGENDAS

THE IMPACT OF CHANGE

Effort and Understanding - Key Elements for a Smooth Transition

1985 Kirkland City Council Retreat  
May 3 and May 17, 1985

Friday, May 3

1:00 sharp (estimated time - 4 hours)

City Council Chambers

- Agenda:      1.      Miscellaneous items needing Council direction or confirmation.  
                 2.      Current Projects, Studies.

Friday, May 17 -- TENTATIVE AGENDA

8:00	-	8:30 a.m.	Coffee
8:30	-	10:30	Professional Facilitator Organization & Individual Reactions to Change
10:30	-	11:00	Jensen-Oldani Report
11:00	-	12:00 noon	Follow-up of May 3 Retreat
12:00	-	1:00 p.m.	Lunch Break
1:00	-	2:00	Setting Priorities - Goals
2:00	-	3:00	Professional Facilitator Follow-up
3:00	-	4:00	Wrap-up

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CITY COUNCIL RETREAT  
AGENDA AND ACTIVITIES  
CITY OF BELLEVUE  
FEBRUARY 1984

Friday                      WORKING RELATIONSHIPS AND PROCEDURES  
3:00-6:00                  Activity 1: Governing a City in 1980's

- . City: A New Frame of Reference
- . Governing Process: What is It?
- . Shaping Forces of the 1980's
- . Leadership: Focus on Vision and Direction

Activity 2: Workings of a Council

- . Video Case Study
- . Analysis and Concepts

- . Insights
- . Link to Our Operations

Friday  
7:30-10:00

Activity 3: Our Council Operations: Actions for Enhancement

- . Focusing Key Issues
- . Discussion
- . Possible Actions
- . Future Direction

Saturday  
8:30-Noon

**FOCUSING BELLEVUE'S FUTURE**

Activity 1: Targeting Bellevue's Future: 1986

- . Individual Identification of Target Issues for 1986
- . Sharing Target and Compiling Target List
- . Review of Target Issues Identified by Staff
- . Finalize Target Issues List
- . Determination of Target Priorities: Top, High, Moderately High, Moderate, Low, Lowest

Saturday  
1:30-4:00

Activity 2: Targeting: An Ongoing Process

- . Target Action Planning Process
- . Target Monitoring Process

Activity 3: Targets: Action Planning

- . Issue Determination for Planning
- . Focus Desired Outcomes
- . Identification of Possible Actions
- . Discussion

Activity 4: Wrap-up

**CITY COUNCIL RETREAT  
GOALS AND OBJECTIVES  
CITY OF BELLEVUE  
FEBRUARY 1984**

**Retreat Goals and Objectives**

- . To build more effective work relations among City Council for enhanced leadership and performance
- . To build a better understanding of the governance process
- . To clarify roles and relationships among City Council, and between Council and staff
- . To explore ways of enhancing our Council operations and procedures

- . To identify specific issues which need to be addressed, determine issue priorities, and develop a work plan aimed at 1986
- . To initiate a process for planning how issues will be handled.

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**BELLINGHAM CITY COUNCIL**  
1983 Planning Workshop

- OBJECTIVES:
- 1) To evaluate and exchange ideas about the manner in which the Council conducts its business
  - 2) To discuss concerns facing the City and to identify some priorities and objectives for Council initiative, including objectives for Council committees
  - 3) To review certain procedures as an initial step in improving the Council's effectiveness in these areas (e.g. budget review and monitoring, capital project planning)

SCHEDULE:

- 9:00 a.m. Doughnuts and Coffee
- 9:15 a.m. The Council and Its Business
- . How are we doing as a team?
  - . How can we enhance the exchange of opinions, points of view and ideas about issues that come before us?
  - . Can we better communicate to the public the basis of our decisions?
- 10:15 a.m. Break
- 10:40 a.m. The Council and Capital Projects/Budget
- . What have been the strengths of our budget review process? How could we improve it?
  - . What changes could be made in the format of the budget itself?
  - . How much do we need to know about capital projects? When should the Council be involved in planning, reviewing progress, etc.?
- 12:00 noon Lunch--smorgasbord sandwiches
- 1:15 p.m. The Council and its Priorities
- . Which issues seem most important to us as Council members? What will have the most immediate impact on the City's future?
  - . What initiatives should the Council implement and how can the committee system be used to advantage?
- 3:30-4:00 p.m. Review/Summary

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SPOKANE

AGENDA FOR COUNCIL RETREAT

April 13-14, 1985

Gonzaga University  
Retreat Center

Saturday, April 13:

9:00 a.m. Information on arrangements and agenda -- Skip Rowland and  
presiding officer.

9:15 - 12:00 Priority-setting -- Barnard/Bender

12:00 - 12:45 LUNCH

12:45 - 1:45 Government organization and fiscal outlook

1:45 - 2:45 City/County relationships

2:45 - 3:00 BREAK

3:00 - 4:00 Planning utilities and fringe area concerns

4:00 - 5:00 Ag-Trade Center/Coliseum/people mover

5:00 - 7:00 Volleyball, etc.

7:00 - 8:00 DINNER

8:00 - 9:00 Community promotion and economic development

9:00 - on Refreshments

Sunday, April 14:

7:30 - 9:00 Breakfast available

9:00 - 10:00 Federal relations and concerns

10:00 - 11:00 State legislation, progress or lack thereof

11:00 - 12:00 The summer's capital projects/retreat wrap-up

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First Session: 8:30 - Noon  
at Klickitat Valley Bank

Review of Legislative Policies

Lunch Noon - 1:30 p.m.

Second Session: 1:30 - 5:00 p.m.  
at Klickitat Valley Bank

1. Ballot Measure for Roads
2. Officers' Row Status
3. Marshall House
4. Zone 1 Parking
5. Health District
6. Camas/Vancouver Water Boundary