



## MEMORANDUM

TO: Mayor and Board of Commissioners

FROM: Bryan Gruesbeck, Town Manager

**SUBJECT: Retreat/Strategic Planning**

DATE: January 23, 2017

**Background:** The Town Board of Commissioners customarily conducts an annual Retreat/Strategic Planning session in January or February to help shape budgetary priorities and direct longer term planning for the Town of Pittsboro. The conversation involves updates from Town Staff and subsequent discussion regarding priorities for the upcoming calendar and fiscal year.

Time allotted for the session has ranged from 4-8 hours and has been held on different days – Saturday morning, Monday morning as well as a weekday evening. The discussion involves a third-party facilitator to help guide discussion – David Long has provided these services since 2013.

Mr. Long indicated during his previous session that he was retiring. However, he indicated a willingness (as of last fall) to continue working with the Town because he finds our work to be extremely interesting and important. You should consider whether to request Mr. Long's services, or engage another firm to assist with the facilitation.

If you wish to select a different firm, the easiest path may be to use a facilitator from UNC's School of Government. The Town has used their retreat facilitation services in the past.

Depending on the availability of the facilitator, I recommend scheduling a retreat date sometime within the next month – no later than mid-February – at a date/time that all Board members can attend.

Basic considerations:

- Location – Over the past few years we have convened at Town Hall. You might also consider the library conference room.
- Day or Evening? – The Town has used different combinations during my time here. Folks are fresh in the morning, but is difficult to schedule due to work schedules.
- Weekend or Weekday? – Again, the Town has used different combinations. Folks are fresh on the weekends, but difficult to schedule due to personal and work reasons.
- Length – How much time do you want to spend in one session?

**Action Requested:** Discuss and provide direction.