



## Strategic Retreat for Survival & Sustainability

### Empowering Museums to Use Impact as a Guidepost for Decision-Making and Planning

A crisis can be immobilizing. Reactionary responses, however, may not result in effective actions. Museums must immediately respond to the economic situation through deliberate decision-making, grounded in reality, while considering long-range implications.

Randi Korn & Associates, Inc. (RK&A) has developed the *Strategic Retreat for Survival & Sustainability* as a focused forum to help museum leadership and staff effectively respond to the immediate financial crisis and consider the long-term actions necessary to sustain operations.

#### UNDERLYING PRINCIPLE

In the strategic retreat, we introduce a new way for museum leadership and staff to think and work together that focuses on the museum's impact, or intended result. A museum's impact describes the ultimate effect a museum has on its community.

We use impact as the underlying principle because it is relevant in the current crisis. First, articulating the impact of a museum's work is a responsible action that makes a museum more *accountable*. Second, working to achieve impact requires museum leadership and staff to *focus on the results* they would like to achieve. Finally, using impact as a guidepost for decision-making empowers museum staff to *use limited resources more efficiently and effectively*.

The strategic retreat is focused on three ideas. Collectively, these ideas provide a results-oriented framework for discussion and debate during the retreat.

- To What End? First, retreat participants begin to clarify the impact the museum aspires to achieve in the community it serves. To what end does the museum carry out its work? A mission statement describes what a museum does; impact is the *result* of what a museum does. Impact can become the museum's guidepost for survival and sustainability.
- Doing Less to Achieve More. Next, participants align the museum's actions with its intended impact. Participants decide what they must do and what they need *not* do anymore if impact is their desired result. Impact provides an immediate decision-making guidepost for difficult choices. Impact also provides a strategy for sustainability, allowing staff to realize doing less can achieve more with actions that deliver the greatest results.
- Taking Time to Assess & Reflect. The retreat concludes with assessment and reflection, topics that support sustainability and deliberate action during a crisis. Periodic assessment is required to know what worked, what did not, and why. Ongoing reflection is required to continually improve and use resources efficiently and effectively. Volatility in the external environment heightens the need for assessment and reflection.

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## RETREAT STRUCTURE

The retreat format provides a dedicated time for a focused discussion among an interdisciplinary group of leadership and staff with diverse perspectives. We encourage participation from staff across the museum and at all institutional levels, including the board of directors. Diverse participation helps to more broadly instill a new way of thinking and working together at the museum.

The strategic retreat combines presentations, facilitated discussions, and small and large group exercises. Inquiry is intentionally used throughout as a facilitation technique to promote dialogue and communication. By cultivating dialogue among the museum's leadership and staff, institutions harness the collective expertise and spirit of the organization mobilizing the group to weather unprecedented times.

The intent of the strategic retreat is to affect change and empower effective action. To maximize its value, the retreat is deliberately structured to include several project elements, as follows:

- Extensive preparation with the museum's planning team and RK&A to collect organizational data (2-hour teleconference)
- Brief preparatory online survey for the museum's leadership and staff
- Review of strategic retreat agenda, suggested reading assignment, and onsite logistics (45-minute teleconference)
- Facilitated strategic retreat with up to 25 participants that emphasizes professional and organizational development (1-day on-site retreat)
- Transcribed retreat notes to document staff and board member discussions
- Retreat report developed in PowerPoint that synthesizes the ideas discussed, outlines prioritized action steps, and can be used as a communication tool
- Presentation and discussion of retreat report (1.5-hour teleconference)

## RETREAT LEADERS

*Randi Korn* is Founding Director of Randi Korn & Associates, Inc. Prior to founding RK&A in 1989, Randi held a variety of positions in museums, including executive director, exhibition designer, interpretive planner, and evaluator. She brings to her work a thorough knowledge of how museums function organizationally. She especially enjoys sharing her experience and enthusiasm for evaluation and intentional practice.

*ACE Everett* is Managing Director at RK&A. ACE brings a unique skill-set to the firm, drawing on her master's degree in business administration and her focused experience in nonprofit management consulting in the cultural community. Her professional interests are developing efficient, mission-driven solutions for museums and cultural organizations by turning sound nonprofit management theory into practice.

## CONTACT US

For more information on the *Strategic Retreat for Survival & Sustainability*, please contact us directly by phone or e-mail. A copy of Randi's article "The Case for Holistic Intentionality" is available upon request or through our Web site.

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