

Museum Retreats

by Mary Case

Planning a board or staff retreat? I surveyed the leadership of forty District of Columbia museums on their use of board and staff retreats. The discussion below summarizes my research and could help you in your planning.

Staff Retreats

Fifty percent of museum CEOs hold retreats with professional and administrative staff as part of normal management activities.

The length of the retreat depends on its purpose. If increased knowledge about some academic or administrative topic is the goal, typically a half-day, off-site is allotted. For example, sister institutions are visited to explore exhibitions, observe educational programs, or to investigate collections management techniques. Survey respondents reported that these retreats improved staff communication, which in turn, improved morale. No facilitator is engaged for these retreats, but frequently museum colleagues act informally as hosts or guides to their museum programs.

If problem solving or planning is the intent, the retreats were arranged for one or two days. Off-site retreat venues (including the director's home) were always chosen. An overnight format was seen as desirable, but money constraints often make this impossible.

Problem-solving topics typically revolve around new projects requiring creative thinking (a capital campaign, a reinstallation of the permanent collection, a new building), budget development, a crisis (budget shortfall or scandal) or an organizational change (the offer of a mission-changing collection or new leadership). If cooperative decision making is necessary or if the topics to be addressed are divisive, an outside facilitator is usually engaged by leadership planning the retreat.

Board Retreats

Only 13 percent of respondents (as compared to 45 percent of executive directors surveyed recently by The Nonprofit Board Report), reported using board retreats. Boards with wide geographic distribution among the membership separate the participants from their respective daily activity. This provides the opportunity for uninterrupted focus, one of the major attractions of a retreat. In these cases, normal board meetings are two-day events, occurring three or four times annually. An evening meal, social and unstructured time together were reported as essential to quality decision making.

Those who conducted board meetings planned as retreats characterized them as providing the board an opportunity for learning, usually about how to respond to a changing

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museum environment. How should the museum react to the American Associations of Museums new statement on ethics, to Excellence and Equity, to pressures on the board to diversify, or to an advocacy agenda?

Board retreats are planned by staff, often with consultant assistance. Facilitation is often done by knowledgeable content experts who reflect a valuable outsider's point of view. Management consultants, urban planners and architects, interpretive specialists, and legal experts have all led museum board retreats in the Washington, D.C. area. Senior staff frequently attend board retreats, especially if the staff holds responsibility for agenda topics.

What Does It Cost?

Cost vary but can be minimal if staff and museum facilities are used. Hiring a facilitator ranges from \$1500 to \$3000 per day depending upon credentials, expertise, and the program content. Material preparation can be negligible to about \$50 per participant. If the retreat includes an overnight, per diem averages \$175. Individual travel costs are additional; sometimes the museum pays and sometimes the board member does. Cost for meeting space can be negotiated with hotels, conference, and retreat facilities, depending upon the number of sleeping rooms reserved.

Why Do Retreats Succeed or Fail?

Survey respondents tied the success of retreats to advance planning, realistic objectives, efficient logistics, and the ability to follow through on decisions taken at the retreat.

This survey found that when the group is too large (more than thirty people), participants feel that their time is wasted on issues that do not affect them. Inadequate planning and poor physical accommodations were reported as major factors when retreats were regarded as unsuccessful.

When emotional issues were discussed without resolution, the retreat was judged as a failure. This occurred when issues were presented without adequate clarifying information. Inadequate or non-existent facilitation contributed to negative results when contentious issues were discussed.

When Are Retreats Not Used?

Three of forty respondents asserted that, in general, retreats were a waste of time. In their view, people were more comfortable working together in their usual environment and, therefore, more efficient. These respondents reported that more could be accomplished at the museum in the normal course of the business day.

Institutions with very stable missions, staff, and board did not use retreats. Institutions with fewer than five employees did not use staff retreats.

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Conclusions

Staff retreats are used as a management tool by about 50 percent of the museum directors surveyed. Board retreats are used less frequently, especially when board members travel some distance for infrequent meetings. These meetings remove the participants from their daily activity and usually embody the essential quality of focus sought by retreat planners. Half-day staff retreats are used for staff learning, one- or two-day retreats are scheduled for planning and problem-solving for both board and staff. Museums reported positive results from retreats with focused agendas, comfortable facilities, and well-prepared participants. Results included increased knowledge, better planning, improved morale, and the resolution of difficult issues.

Addenda

I did this research and wrote this article in 1994. Rereading it in 2008, after conducting dozens and dozens of retreats, I'm comforted that everything holds true (I have updated the costs slightly).

I would add, one success criteria: a board retreat is the responsibility of the board. Make sure there is a committee of the board engaged, responsible, leading the effort.