



Docomomo US Report on Strategic Planning Retreat May 3, 2022

Overview

Docomomo US entered a new era in 2021. Making its first-ever leadership transition in a rapidly changing world, the organization sought clarity and direction. It began with virtual strategy sessions in April 2021 led by John Bwarie, founder and CEO of Stratiscope, and Cindy Olnick, heritage communications consultant. These sessions yielded some key insights and activities for the near term.

On April 8 and 9, 2022, the organization took a deeper dive at an in-person retreat, also facilitated by John and Cindy, in Milwaukee. Through two days of hard work and collaboration, the board and staff of Docomomo US created a new vision and mission, a set of key goals, and some specific tactics to achieve each goal. The group also held robust discussions (that will continue) about issues ranging from equity to the meaning of modern heritage.

This report summarizes key outcomes and insights from the retreat in several sections:

- Part I: Vision, Mission, and Goals
- Part II: Recommendations
- Part III: Key Insights
- Part IV: Detailed Goals and Tactics

Appendices with much more detail include:

- Resources from the context and the Zoom chat (from our virtual attendees)
- The context from Day One
- A PDF of the peer organization review as it was presented at the retreat, including the structural/organizational info not discussed on site
- Complete notes from the retreat, including the working group updates

You might find these Google Sheets helpful as working documents or starting points:

- **Peer organization review** with modifications during and after the retreat
(short URL: bit.ly/docopeers)
- **Goals and tactics** mapped out to show areas of potential overlap
(short URL: bit.ly/docotactics)

Your dedicated work made this time together productive. The candor, cohesion, and camaraderie among board and staff made all the difference in getting where you needed to go. It's exciting to see how Docomomo US will continue to push the boundaries of preserving modernism.

Part I. Vision, Mission, and Goals

Docomomo US has a new vision and mission for this new era, as well as some key goals to help you focus your efforts.

Vision

A world where people value modern heritage and use it to shape vibrant communities

Mission

Pushing boundaries to preserve modern architecture, landscapes, and design through principled advocacy, collaboration, and celebration

Goals

1. Docomomo US is an inclusive and diverse organization.
2. Docomomo US is a financially stable organization with robust reserves.
3. Within three years, Docomomo US's influence is felt in all 50 states.
4. Docomomo US is a rewarding place of engagement for board, staff, and volunteers.
5. Docomomo US has a renewed, formal documentation program.

Part II. Recommendations

As you pursue your goals through specific tactics outlined at the retreat, the following suggestions may help you make the most of your efforts:

1. Review Goal #4 (“rewarding place for board, staff, and volunteers”) and expand its tactics once defining what this means for board members, staff, and volunteers.
2. Start with the plans and frameworks noted in the tactics, especially:
 - a. In Goal 1: Strategy to identify and cultivate board candidates
 - b. In Goal 2: Goal and process for the reserve fund (within six months; Executive Committee to share at next in-person board meeting)
 - c. In Goal 3: Communications strategy
 - d. In Goal 4: Plan/strategy for board development and future leadership transition (within six months)
 - e. In Goal 5: Five-year documentation strategy (within one year)
3. Add timelines for tactics. We recommend Gantt charts to clarify potential overlaps and overloads.
4. Include status updates in every board meeting to help keep focus on the plan and accountability.
5. Consider DEI and communications in all tactics (not necessarily as key factors but as factors nonetheless, to help spot potential challenges, needs, and opportunities).
6. Consider joining or otherwise supporting groups including Latinos in Heritage Conservation and Asian and Pacific Islander Americans in Historic Preservation.

Part III. Key Insights

Among many valuable discussions at the retreat, we wanted to highlight two topics that can serve you well in the day-to-day work of pursuing your goals.

Organizational Learning

As part of the context on Day One, we discussed the value of organizational learning as an ongoing process of assessment and reflection to help you stay on mission while adapting to constant and/or unexpected changes. You reported learning the following over the past two years:

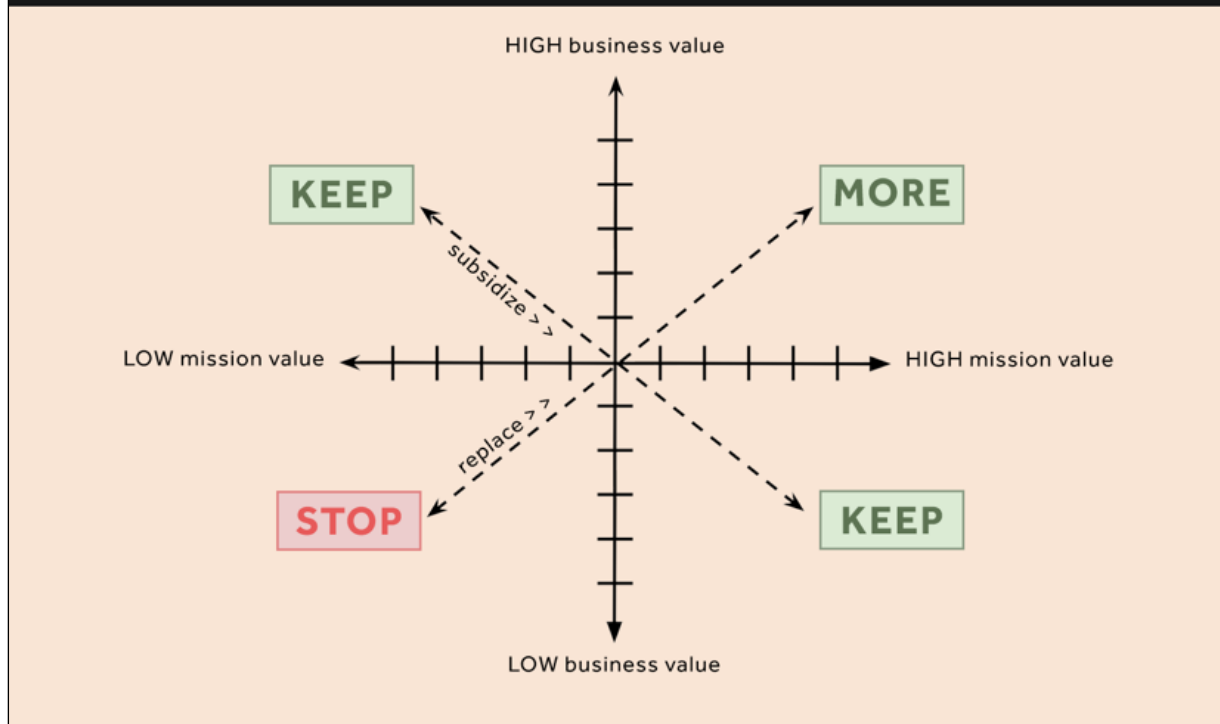
- To be nimble
- We can't rely on the past
- We need to focus on social issues, not just architecture
- The importance of reserves
- People will be more selective about traveling to conferences
- Hybridization helps DEI – greater access, reach, range of voices on both ends (presenters and attendees)
- Consistency of having Liz – her deep knowledge and context
- Human quality – reassurance in seeing each other; we want to be together
- We want to keep the innovations we've made

You may find it useful to keep these lessons in mind, as well as to continue this learning process through periodic reflection.

Decision Framework

We also discussed the perennial issue of how to stay the course amid constant change and competing priorities. We explored the tension between business value (e.g., staff time, money) and mission value (pushing boundaries to preserve modern architecture, landscapes, and design through principled advocacy, collaboration, and celebration).

Mission Value vs. Business Value



This framework can help you evaluate potential programs and other opportunities. While ideally, you'd like as much of your work as possible to fit into the upper-right quadrant, you can fit other efforts strategically (e.g., using high business/low mission projects to subsidize high mission/low business ones).

When considering what to do, keep these questions in mind:

- What are the things that ONLY you can do?
- What can you do in partnership with others who can do it better, cheaper, faster, etc.?
- What pushes boundaries?

As Bob Mackfessel noted, it will also help to make sure you discuss new ideas by the third quarter of the fiscal year (versus “early next year”) so you can budget for them in the fourth quarter.

PART IV. Detailed Goals and Tactics

Below we list the new goals noted earlier, along with the initial tactics brainstormed at the retreat. Each goal is assigned to an existing Docomomo US committee. Since most (if not all) goals span multiple committees, we identified a lead committee where relevant.

The tactics may need further refinement—particularly Goal #4, which was not addressed in detail at the retreat. Some tactics may increase or decrease in priority, or otherwise evolve, over time.

The accompanying spreadsheet (short URL: bit.ly/docotactics) includes these goals and tactics, and identifies stated or potential overlaps. You may find this document, or something similar, useful as the beginning of a workplan.

NOTE: For ease of organization and reference, the tactics below are numbered, but they are not listed in any priority order.

Goal #1: Docomomo US is an inclusive and diverse organization.

Committee(s): DEI (lead); Nominating

People: Flora Chou (DEI chair), Michele Racciopi (staff lead), Jesus “Chuy” Barba Bonilla, Monica Schaffer, Brad White

Strategies/tactics:

1. Diversify board and staff.
 - a. Work with the Nominating Committee on a strategy to identify and cultivate board candidates.
 - b. Identify how/where to recruit diverse pools of future job applicants.
 - c. Build partnerships with groups including the National Organization of Minority Architects (NOMA), Latinos in Heritage Conservation (LHC), Asian and Pacific Islander Americans in Historic Preservation (APIA-HiP), and Historically Black Colleges and Universities (HBCUs) – start by showing up: attend their events/programs, become an organizational member, support them if/when asked.
2. Uncover and amplify the underrepresented voices and stories of modernism to make sure they all our work includes them.
 - a. Work with the Communications Committee to identify news hooks for existing content (e.g., Black History Month).

- b. Identify sources of existing stories/content (e.g., photographers, patrons of modern houses).
 - c. Work with the Register Committee to document the work of underrepresented architects.
 - d. Meet with representatives of the National Trust for Historic Preservation's African American Cultural Heritage Action Fund to start building a relationship, seek their advice, and explore potential collaboration.
 - e. Follow up with Susan Glimcher at the Advisory Council on Historic Preservation.
3. Make sure these stories are told by the communities themselves whenever possible.
 4. Review all programs/activities through a DEI lens; create brief guidelines for each (e.g., makeup of speaker panels) and distribute to chapters.
 5. Secure funding for documentation of untold stories; research relevant grants, funders, partners (this could take time since funders consider board composition).
 6. Within three years, create a summer "field school" like that of the Vernacular Architecture Foundation (or consider partnering with them, since they have the infrastructure) to document threatened buildings. [also under Goal #5]
 7. Provide DEI training to board and chapters.

Goal #2: Docomomo US is a financially stable organization with robust reserves.

Committee(s): Fundraising (lead); Executive

People: Meredith Bzdak (Fundraising chair), Liz Waytkus (staff lead), Flora Chou, Gunny Harboe, Katie Horak, Eric Keune, Bob Mackfessel, Bob Pullum, Barry Solar, Barbara Yanni

Strategies/tactics:

1. Within four years, increase the annual budget to \$800,000 with a robust reserve fund.
2. Hire three more staff members (in addition to the new membership hire), the first of whom is dedicated to fundraising.
3. Within five years, add a \$50,000 corporate sponsorship line item to the operating budget.
4. Consider hiring a professional fundraising expert to help with strategy.
5. Determine what we can expect in the main fundraising categories of individual and corporate memberships, grants/fellowships, and earned income/programs.

6. Expand our membership base and analyze current members to identify the top 100 prospects among individuals and corporations.
7. Work with the Membership Committee to evaluate giving levels and benefits.
8. Consider the financial and membership impact of creating new chapters.
9. Identify projects and programs that would make good candidates for grant/fellowship applications; build relationships with relevant program officers/organizations.
10. Develop new collateral materials.
11. Develop a four-year plan with milestones and deadlines for seeking grants.
12. Expand our base of modernist homeowners.
13. Consider planned giving options.
14. Consider earned income.
15. Evaluate the auction: schedule, effectiveness, cost/benefit.
16. Make sure other committees coordinate their fundraising efforts with the Fundraising Committee.
17. Within six months, establish a goal and process for the reserve fund: Executive Committee share at next in-person board meeting (e.g., allocate 5-10% of budget each year to go into a separate account).

Goal #3: Within three years, Docomomo US's influence is felt in all 50 states.

Committee(s): Advocacy (lead), Chapter Relations, Communications

People: Todd Grover (Advocacy chair), Liz Waytkus (staff lead), Jesus “Chuy” Barba Bonilla, Flora Chou, Gunny Harboe, Rachel Leibowitz, Bob Mackfessel, Bob Nauman, Theo Prudon, Bob Pullum, Michelangelo Sabatini, Monica Schaffer, Brad White

Strategies/tactics:

1. Within one year, create a principled advocacy framework focused on the principles of modernism, regardless of time and style.
2. Within one year, develop a more supportive chapter framework. [also under Goal #4]
3. Create a communications strategy.
4. Within five years, strengthen three existing chapters (Florida, New England, Oregon) and form two new chapters (Arizona, New Mexico).
5. Conduct a baseline assessment of our current influence, both physically (map states, survey chapters/boots on the ground) and digitally (analytics), to inform approach.
6. Create advocacy and communications toolkits for chapters.

7. Reach out to influencers in chapters and others; ask them to use strategic/relevant hashtag(s).
8. Share best practices and guidance through case studies of chapter work.
9. Within one year, double our social media followers.
10. Make our content and expertise more visible through our website, newsletter, and social media.
11. Within six to twelve months, create a Symposium strategy for staffing, regularity, location, and outcomes.

Goal #4: Docomomo US is a rewarding place of engagement for board, staff, and volunteers.

[NOTE: Not addressed in detail at the retreat.]

Committee: Executive

People: Bob Mackfessel (Executive Committee chair), Liz Waytkus (staff lead), Meredith Bzdak, Flora Chou, Todd Grover, Katie Horak, Barry Solar, Barbara Yanni

Strategies/tactics:

1. Within six months, develop a plan/strategy for board development and future leadership transition.
2. Within one year, create an advisory board.
3. Within one year, develop a more supportive chapter framework. [also under Goal #3]

Goal #5: Docomomo US has a renewed, formal documentation program.

Committee: Register

People: Liz Waytkus (staff lead), Gunny Harboe, Katie Horak, Rachel Leibowitz, Anna Mod, Bob Nauman, Michelangelo Sabatini

Strategies/tactics:

1. DONE: By the 2022 annual meeting, create a documentation committee that includes membership and chapters.
2. Within one year, develop a five-year documentation strategy.
3. Within three years, create a summer “Field School” to document threatened buildings (or consider partnering with the Vernacular Architecture Foundation, which has the infrastructure). [also a tactic in Goal #1]
4. Identify existing archives, and lists of archives, to add to our website.
5. Assess the fiche/register program and evaluate its efficacy; understand the context of our obligation as an organization to have a register, what we’re doing to fulfill it, and whether it’s working.

6. Create a clearinghouse/resource on our website of National Register nominations related to modernism.
7. Establish relationships with professors of documentation in academic programs for preservation.
8. Leverage the existing/ongoing work of chapters: survey chapters to determine what's working and what's not; create a documentation framework for chapters to use if the fiche system isn't an effective tool.
9. Identify ways to use cutting-edge documentation methods in the spirit of fiche; document resources that may not be documented through existing programs (counternarratives, etc.). Start local with chapters seeking grants for pilot programs to scale/replicate.
10. Identify existing surveys; add to/create resource page on our website.
11. Crowdfund documentation by identifying people who already do it themselves and/or create platforms for others (e.g., photographers on Instagram).