



**ORAL HISTORY IN THE
MID-ATLANTIC REGION
STRATEGIC PLAN 2015-2020**

March 2014

BACKGROUND

In June 2013, the Board of Officers of the Oral History in the Mid-Atlantic Region (OHMAR) initiated a strategic planning process in order to better focus OHMAR's resources and initiatives for the digital age, and to enhance the vibrancy of the organization.

A strategic planning committee was formed, comprised of four members of OHMAR's Board of Officers:

- Jason Steinhauer, Library of Congress (*Chair*)
- Lu Ann Jones, National Park Service
- Anne Rush, University of Maryland
- Katherine A. Scott, U.S. Senate Historical Office

The committee developed the strategic plan over an eight-month period from June 2013 – February 2014. The plan incorporates feedback and input from current OHMAR President David J. Caruso, the current OHMAR Board, several of OHMAR's past Presidents, and current OHMAR membership (solicited via email survey).

The resulting document lays out OHMAR's strategic goals for the next five years, from 2015 – 2020. In late 2018, it is intended that a new strategic planning committee will form, and begin the process of assembling OHMAR's 2020 – 2025 strategic plan, with ratification by membership by December 31, 2019.

THE VISION

Over the next five years, from 2015 – 2020, Oral History in the Mid-Atlantic Region (OHMAR) intends to become the leader in providing oral historians from New York to Virginia—as well as those interested in oral history in the region and beyond—the network, community, expertise, support, resources, and tools to aid them in the practice of oral history.

OHMAR will create and sustain a welcoming and easily-accessible network of oral historians region-wide that includes scholars, practitioners, students, and hobbyists alike, and which communicates news, information, tips, and expertise on matters of relevance to oral historians.

OHMAR will host conferences, workshops, and formal and informal events for its members and users, as well as provide awards, resources, and access to an online directory of oral history practitioners and projects exclusively for members.

OHMAR will advocate for the value of oral history to policymakers, educators, public history professionals, academics, and students region-wide in publications, journals, and traditional and social media.

OHMAR will strengthen its internal processes and organizational structure to ensure accountability and efficiency, and to allow membership to grow and the organization to be sustainable.

The details of this vision are laid out in the four strategic goals articulated in our strategic plan. None of the four strategic goals is more important than another, and none need be completed before another can begin. The goals fit together to form the cohesive set of activities that will define OHMAR from 2015-2020. Each initiative reinforces each other, and progress toward realizing each can be undertaken simultaneously. Milestones toward full implementation are included at the back of this document.

THE GUIDE

Our strategic plan is guided by:

OUR MISSION STATEMENT:

OHMAR is a non-profit organization dedicated to the promotion and improvement of oral history. This body responds to the needs of those actively practicing or otherwise interested in oral history in the Mid-Atlantic region. OHMAR provides a forum for sharing information about the techniques and application of oral history, promotes standards of quality among practitioners, and assists those interested in the subject. Members include public and academic historians, librarians, archivists, teachers, folklorists, and independent researchers.

OUR VISION STATEMENT:

Support established and emerging oral historians in the practice of oral history by providing information and resources, an accessible community of expertise, and a vibrant professional and social network.

OUR CORE VALUES:

Identified by our leadership and affirmed by our members, all priorities and actions will be guided by these five values:

OPENNESS
PASSION
COMMUNITY
EDUCATION
EXPERTISE

GOAL 1: Create and sustain a welcoming and easily-accessible network of oral historians region-wide that includes scholars, practitioners, students, and hobbyists alike, and which communicates news, information, tips, and expertise on matters of relevance to oral historians.

- Web & Digital Media**
 - Build a dynamic website, OHMAR.org, that allows for easy online member sign-up and renewal, simple conference and workshop registration, access to relevant blog and social media content, engaging audio-visual content, an elegant e-newsletter management system, a “Donate Now” button, an online membership list, and an online project directory members can access.
 - Hire a web developer to build and maintain OHMAR.org.
 - Create a Communications Committee comprising officers and members to generate content for OHMAR.org relevant to all levels of interest and experience with oral history in the region, featuring the expertise of oral historians in the organization, region, and beyond.
 - Use social media and listservs to initiate conversations and build community around topics of interest to oral historians in the region.
 - Link to tips, best practices, and resources for oral history in the mid-Atlantic region on OHMAR.org and on social media.
 - Be social in our digital marketing: engaging, friendly, conversational, and welcoming across all channels.

- Membership**
 - Continue to offer low membership fees and low conference and workshop fees in order to attract members at all stages of their careers and from all backgrounds.
 - Initiate a membership drive to gain new members.
 - Institute procedures for welcoming new members, and for sustaining meaningful communication with existing members through the life of their membership.
 - Celebrate and spotlight the diversity of our membership: age, profession, race, ethnicity, geography, and experience.

- Community**
 - Form a new Program Committee comprising officers and members to coordinate programmatic & social activities across the region that appeal to various cross-sections of membership.
 - Organize brown bags, happy hours, and institution tours for members.
 - Host OHMAR meet-ups at annual meetings of national organizations our members attend, such as AHA, OHA, OAH, NCPH, etc.
 - Utilize the social web to create a virtual community that complements the physical community.
 - Coordinate virtual meet-ups as technology allows.

GOAL 2: Host conferences, workshops, and formal and informal events for members and users, as well as provide awards, resources, and access to an online directory of oral history practitioners and projects exclusively to its members.

- Awards**
- Continue to offer the Forrest C. Pogue Award for lifetime achievement in oral history, nominated and selected by OHMAR past presidents.
 - Offer a new Martha Ross Memorial Prize, awarded annually to a graduate or an undergraduate student member of OHMAR, selected via an annual competition.
- Events**
- Continue to hold an annual conference, with dates confirmed 5 years in advance and with a modest registration fee for attendees.
 - Continue to hold two annual workshops, one in the fall and one in the spring in conjunction with the conference, scheduled 5 years out with modest registration fee for attendees.
 - Name a program chair and local arrangements chair for the annual meeting and annual workshop three years in advance, and offer ample opportunities for volunteers to be involved in planning both.
 - Task the new Program Committee with formulating ideas for informal, low-cost events that members can have access to year-round: online workshops, institutional tours, networking opportunities, brown bag lunches, etc.
 - Pursue opportunities for joint seminars with universities in each region, as appropriate and when strategically advantageous.
 - Co-sponsor events with history organizations and public history institutions, as appropriate and when strategically advantageous.
- Resources**
- Produce and share oral history resources targeted toward educational institutions—middle, high, collegiate - region-wide.
 - Produce and share oral history resources targeted toward museums, archives, libraries, and historical societies region-wide.
 - Sponsor a new annual “Oral History in the Classroom” workshop in collaboration with, and on the premises of, colleges and universities.
 - Create an online “Ask an Expert” video series for the web featuring OHMAR leaders, embedded on OHMAR.org and YouTube / Vimeo.
 - Link to other known existing best practices and resources from around the web on OHMAR.org.
- Online Directory**
- Build and maintain a comprehensive online directory of oral historians and oral history projects in the mid-Atlantic, accessible to members.
 - Create a Project Directory Coordinator to solicit, screen, and update information about mid-Atlantic oral history projects.
 - Enable submissions to the online directory from around the region via an online form.
 - Spotlight projects in the online directory on social media and in e-bulletins.

GOAL 3: Advocate for the value of oral history to policymakers, educators, public history professionals, academics, and students region-wide in publications, journals, traditional and social media.

- Expertise**
- Promote the exceptional expertise within OHMAR’s membership.
 - Develop special “expert” panel discussions using distinguished OHMAR members at conferences, workshops, and other gatherings around topics of relevance and interest to oral historians.
 - Offer and highlight expertise from OHMAR veterans and OHMAR leadership to those in the field as a resource.
 - Create videos and podcast discussions that spotlight OHMAR veterans and their careers and work.
 - Craft OHMAR proposals for national and regional conferences.
- Advocacy**
- Highlight the educational impact of oral history in high schools and universities to policymakers at conferences, in publications, and on social media.
 - Encourage Board members to write and publish articles or blogs on oral history during their tenure on the Board under the banner of OHMAR.
 - Develop and lead a region-wide campaign to raise awareness of oral history’s value and significance.
- Strategic Relationships**
- Build programmatic partnerships with policymakers, leadership of historical organizations, and sister associations.
 - Invite organizations, teachers, and political leaders into conversations around integrating oral history into their programming.
 - Deepen ties with national, regional, and international oral history organizations.
 - Develop collaborative partnerships with Congress, federal, state, and local governments, NEH, and others.
 - Use Washington, D.C. as leverage point for connecting to policymakers and grant-makers.
 - Designate a Board member to be liaison to national and regional organizations
 - Strengthen interpersonal relationships with leadership of other organizations.
 - Invite organizations to meet with OHMAR representatives when conferences are held in cities where OHMAR reps live and work.
 - Position OHMAR as a pipeline to new members for OHA, others.
 - Funnel information from OHA to OHMAR membership and vice versa to inform direction and policy.

GOAL 4: Strengthen internal processes and organizational structure to ensure accountability and efficiency, and in order to allow membership to grow and the organization to be sustainable.

- Organizational Structure**
- Create an organizational chart.
 - Delineate clearly defined roles, duties and responsibilities for all Board positions.
 - Establish an annual budget planning cycle.
 - Decide on committees to accomplish goals for Development; Digital Communications; Education; Programs; and Membership.
 - Develop a reporting structure for all new committees.
 - Create a pipeline for members to become more involved through committee membership positions.
 - Allow OHMAR Board to focus on strategy, fundraising, high-level relationship building, and sustainability.
 - Implement a system for membership renewal notices.
 - Review and revise the prerequisites for the President, Vice President, and Board positions.
 - Re-examine bylaws and tenures of Board positions.
- Regional re-alignment**
- Subdivide the region into two parts—39.95 degrees latitude (Philadelphia) and above; and below 39.95 degrees latitude.
 - Appoint enthusiastic subdivision representatives to spearhead social outings for their area, collect data on oral history projects in their area, and report back to Board on activities and needs in their area.
- Identity**
- Review our mission statement.
 - Formally adopt our vision statement.
 - Design a new logo and organizational brand identity.

MILESTONES

2015

- Website redesign & upgrade
- Internal roles and re-structuring
- By-laws review
- Cost structure and revenue stream review
- Set conference and workshop schedule through 2019
- Design new logo and brand identity
- Enhance social media presence

2016

- Identify committees to be formed
- Develop internal mechanisms for committee reporting
- Sub-divide region
- Formulate outreach plans across region for volunteers
- Implement regional split and new committee structure

2017

- Appoint regional heads
- Fill organizational committees with officers and members
- Lay out goals for committees in regions
- Fundraise for Martha Ross Memorial Prize
- Collect oral history project information region-wide for directory

2018

- Design and execute new outreach initiatives across the region and with partners
- Design and build master database of oral history projects
- Launch membership drive
- Launch online directory on OHMAR.org

2019

- Implement new programs with schools and institutions across the region
- Create new online resources for oral historians on OHMAR.org
- Award first Martha Ross Memorial Prize
- Host first joint seminars with universities and public history organizations
- Collaborate with strategic partners on programs, conferences, and initiatives

IMPLEMENTATION

Upon ratification by OHMAR membership, OHMAR will begin implementation of the strategic plan.

OHMAR will create benchmarks and milestones for each of the four goals, to ensure that progress is made on each of the plan elements.

OHMAR will enlist members region-wide to participate in bringing elements of the plan to fruition. Execution of the plan will be an entire organizational effort.

Portions of all elements of the plan are to be initiated by the close of the calendar year 2019. At that time, the new strategic plan for 2020-2025 will be implemented.

This is an exciting time for OHMAR. The future is very bright indeed.