



**ORAL HISTORY IN THE
MID-ATLANTIC REGION
STRATEGIC PLAN 2020-2025**

January 2020

BACKGROUND

THE ORGANIZATION

The main incentive for becoming a member of the Oral History in the Mid-Atlantic Region (OHMAR) seems to be participation in the annual conference. Therefore, the majority of current members join and/or renew their membership as part of their conference registration. The average conference attendance is 55 individuals. On average, the membership grows by 20 new member sign-ups outside of the conference registration per year.

OHMAR recently raised its membership dues commensurate with similar regional organizations. In 2019, it also established a new institutional membership rate to incentivize student participation through their colleges/universities. See more [here](#). OHMAR does not track members' geographical distribution or demographics.

One does not need to be a member to participate in OHMAR's workshops and receive OHMAR's newsletter. The newsletter is distributed to approximately 750 email addresses.

OHMAR's primary form of income is driven by fees for conferences, workshops, and membership dues. Since 2017, conference sponsorship and ten-year institutional memberships have significantly contributed to income increases while keeping expenses low.

Since 2017, OHMAR's general operating budget has increased by 155.82%. From 2017 through 2019, yearly expenses decreased by 46.78%. The organization's opening balance was \$1,133 in January 2017, and \$9,125 in January 2020. The income from membership fees was \$995 in 2017, \$235 in 2018, and \$2,355 (including two 10-year institutional memberships) in 2019. The income from sponsorship fees was \$2,000 in 2017, \$950 in 2018, and \$950 in 2019. OHMAR's money market account has held steady at \$15,950, yielding a small interest return each year.

An initiative of the previous strategic plan was to begin fundraising for the annual [Martha Ross Prize](#) (MRP). In a roughly four-year period, OHMAR raised approximately \$5,000 towards this prize; nearly half of which was raised in 2017 alone. Since 2017, OHMAR has dedicated \$10 from each conference registration to MRP. This practice maintains sustainable fundraising to contribute to the fund each year. In 2018, there

was a conference registration option to donate directly to the MRP. Funds raised for MRP are kept separate from the general account in a business money market. OHMAR awarded the MRP in 2019 and 2020.

THE STRATEGIC PLAN

In June 2013, the Board of Officers of the Oral History in the Mid-Atlantic Region 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.

The initial Strategic Planning Committee was 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; and Katherine A. Scott, U.S. Senate Historical Office.

At the beginning of 2020, OHMAR updated the strategic plan to continue giving OHMAR direction for its resources and initiatives as well as to address new needs from its membership and the evolving digital age.

Board members Molly Graham (National Oceanic and Atmospheric Administration) and Anna F. Kaplan (DC Oral History Collaborative) spearheaded the new strategic plan with feedback and input from the current OHMAR Board and ratified by the membership in March 2020.

The resulting document lays out OHMAR's strategic goals for the next five years, from 2020 to 2025.

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, students, 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

THE VISION

Over the next five years, from 2020 to 2025, Oral History in the Mid-Atlantic Region (OHMAR) intends to build on its progress in becoming 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 sustain and expand the welcoming and easily-accessible network of oral historians region-wide that includes diverse 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 members and users, as well as provide awards and resources, including access to an online directory of OHMAR members and spotlights on oral history projects.

OHMAR will promote the value of oral history.

OHMAR will continue to strengthen internal processes and organizational structure to ensure accountability, efficiency, diversity, and sustainability in order to encourage membership to grow and for members to join the Board and Committees to make the organization better reflect its membership.

The details of this vision are laid out in the four strategic goals articulated in the 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 2020-2025. Each initiative reinforces each other, and progress toward realizing each can be undertaken simultaneously. A Timeline for Key Deliverables toward full implementation is included at the back of this document.

GOAL 1: Maintain and expand the network of oral historians region-wide that includes diverse scholars, practitioners, students, and hobbyists alike, and which communicates news, information, tips, and expertise on matters of relevance to oral historians.

Digital Engagement

- Ongoing Deliverables:
 - Evaluate and address the need for a members-only section of the website.
 - Use social media and listservs to initiate conversations and build community around topics of interest to oral historians in the region.
 - Engage members to use OHMAR's digital presence as a platform to promote their endeavors and to spark critical conversations. For example: social media take-overs, blog posts featuring class projects, etc.
 - Promote 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.
- New Deliverables:
 - Update and redesign the website, OHMAR.org, to allow for streamlined management, 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, and a forum for members to share with and learn from each other.
 - Assess OHMAR's presence on social media platforms and streamline content management/posting across all platforms.
 - Update the e-Newsletter to fit members' needs and how they prefer to receive/consume OHMAR news/updates.
 - Use OHMAR's online platforms to promote transparency and awareness of the Board's activities.

Membership

- Ongoing Deliverables:
 - 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.

- 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.
- New Deliverables:
 - Promote the new Institutional Membership option throughout the region.

Community

- Ongoing Deliverables:
 - Host OHMAR meet-ups at annual meetings of national organizations our members attend, such as AHA, OHA, OAH, NCPH, etc.
 - Utilize OHMAR's digital presence to create a virtual community that complements the physical community.
- New Deliverables:
 - Facilitate networking and socializing opportunities for members. These may include lunch-time lectures, happy hours, institution tours for members, etc.
 - Explore the feasibility of forming a new Program Committee comprising officers and members to coordinate and promote these opportunities.

Project Spotlights

- Ongoing Deliverables:
 - Amplify/promote oral history endeavors through OHMAR's digital platforms.
- New Deliverables:
 - Identify a Project Spotlights Coordinator (either a board member or a general member) to solicit, schedule, and organize a series of OHMAR social media/blog take-overs.
 - Help museums, centers, archives, project staff, students, and individuals create a series of posts to highlight their oral history work/collections and practitioners throughout the region. Share these posts across OHMAR's digital platforms.

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

Awards

- Ongoing Deliverables:
 - Continue to offer the [Forrest C. Pogue Award](#) for lifetime achievement in oral history, nominated and selected by OHMAR past presidents.
 - Continue to offer the Martha Ross Memorial Prize, awarded annually to a graduate or an undergraduate student member of OHMAR, selected via an annual competition.
 - Continue to offer OHMAR Conference Scholarships to assist students, contingent academics (i.e. those without departmental support for conferences), and independent scholars with the costs of attending OHMAR's annual conference.
- New Deliverables:
 - Find new and different ways to fundraise for these awards and scholarships.

Events

- Ongoing Deliverables:
 - Continue to hold an annual conference, with dates and/or location confirmed, 2 to 3 years in advance and with a modest registration fee for attendees.
 - Regularly provide or facilitate an annual workshop with a modest registration fee for attendees.
 - Name a program chair and local arrangements chair for the annual meeting and annual workshop 1 to 2 years in advance.
- New Deliverables:
 - Set workshop topics 2 to 3 years in advance. Explore the possibility of connecting these workshops with the NEH-funded Seminar, Institute, or Workshop offerings.
 - Offer opportunities for volunteers to be involved in planning conferences and workshops.

Resources

- Ongoing Deliverables:

- Link to other known existing best practices and resources from around the web on OHMAR.org.
- New Deliverables:
 - Disseminate oral history resources targeted toward educational institutions—middle, high, collegiate—region-wide.
 - Disseminate oral history resources targeted toward museums, archives, libraries, and historical societies region-wide.
 - Use digital engagement “take-overs” to make advice, guidance, and expertise from oral history leaders more accessible to members.

Online Directory

- New Deliverables:
 - Create a members-only section of the OHMAR website.
 - Provide access to a directory of OHMAR members in the members-only section.
 - Establish a forum in the members-only section where OHMAR members can engage in discussions about oral history practice, theory, archives, teaching, etc.

GOAL 3: Promote the value of oral history.

Expertise

- Ongoing Deliverables:
 - Promote the exceptional expertise within OHMAR's membership.
 - Offer and highlight expertise from OHMAR members and OHMAR leadership to those in the field as a resource.
 - Develop special "expert" panel discussions using OHMAR members at conferences, workshops, and other gatherings around topics of relevance and interest to oral historians.
 - Craft OHMAR proposals for national and regional conferences and encourage OHMAR members creating proposals for national and regional conferences.

Promotion

- Ongoing Deliverables:
 - Highlight the educational impact of oral history in high schools and universities to policymakers at conferences, in publications, and on social media.
- New Deliverables:
 - Encourage Board members to write and publish articles or blogs on oral history during their tenure on the Board, acknowledging their relationship to OHMAR in those publications.

Strategic Relationships

- Ongoing Deliverables:
 - 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.
 - Build programmatic partnerships with stakeholders, leadership of historical organizations, and sister associations.
 - Funnel information from OHA to OHMAR membership and vice versa to inform direction and policy.
- New Deliverables:
 - Develop collaborative partnerships with strategic partners to support/fund oral history in the region.

- 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.

GOAL 4: Continue to strengthen internal processes and organizational structure to ensure accountability, efficiency, diversity, and sustainability in order to encourage membership to grow and for members to join the Board and Committees to make the organization better reflect its membership.

Organizational Structure

- Ongoing Deliverables:
 - Review roles, duties, and responsibilities for all Board positions.
 - Continue the annual budget planning cycle.
 - Review and revise the prerequisites for the President, Vice President, and Board positions.
 - Re-examine bylaws, tenures of Board positions, and strategies for making the Board more representative of the membership.
- New Deliverables:
 - Create an organizational chart.
 - Create living, written guides or manuals for recurring tasks or duties to smooth over Board transitions and to retain Board memory and experience.
 - Make easily-understandable and summarized versions of the organizational chart and role descriptions, respectively, available to the public.
 - Decide on committees to accomplish goals for Development; Digital Communications; Education; Programs; Students and Emerging Professionals; 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.
 - Develop practices for documenting and archiving OHMAR organizational history, especially born-digital paraphernalia.
 - Set standards for OHMAR financial accounts and research ideal money market accounts/financial investment and management.

Identity

- Ongoing Deliverables:
 - Review the OHMAR mission statement.
 - Re-evaluate and re-imagine what “membership” in OHMAR means.

TIMELINE FOR KEY DELIVERABLES

Recurring

- Set future conferences and workshops
- Offer scholarships and prizes
- Fundraising for scholarships and prizes
- Social media presence and engagement
- Facilitate networking and socializing opportunities

2020

- Digital engagement assessment and strategy
- Website redesign and upgrade
- Writing guides/manuals for Board activities
- Research best options for financial investments
- Create plan for initiating collaboration with strategic partners
- Create plan for initial social media take-overs

2021

- Launch members-only section of the website, including forum
- Identify committees to be formed
- Develop internal mechanisms for committee reporting
- Formulate outreach plans across region for volunteers
- Make social media outreach a sustainable, formalized process
- Update financial investments and accounts

2022

- Develop standards for documenting and archiving OHMAR publications, conference proceedings, blog posts, etc.
- Fill organizational committees with officers and members
- Develop regional outreach plan to connect and collaborate with museums, archives, universities and other historical societies and organizations in the Mid-Atlantic region
- Expand board membership through partner relationships

2023

- Update guides/manuals and share with other oral history institutions
- Encourage OHMAR representation at various national conferences
- Develop list or directory of partner institutions

2024

- Strategic plan review
- Re-examine bylaws, tenures and strategies for ensuring a representative board
- Call for feedback from members to help improve OHMAR's mission, deliverables and service
- Examine fundraising strategies and strengthen development plan

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 2024. At that time, the new strategic plan for 2025-2030 will be implemented.

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