



THE OREGON  
HISTORICAL  
SOCIETY  
FOUNDED 1898

## STRATEGIC PLAN

2014 - 2018

Approved by the Board of Trustees May 3, 2014

## **MISSION**

*Explore Oregon's past to enrich our present and inspire our future.*

## **VISION**

The Oregon Historical Society is a robust state historical society offering high quality museum, library, education, and publishing programs.

Understanding how people in the past created the place we inhabit today allows us to imagine how our actions will determine Oregon's future. The Oregon Historical Society works with and for all the state's communities to generate and share knowledge about Oregon history by:

- Collecting, preserving, and interpreting documents and artifacts from our past
- Creating opportunities for scholars to conduct research and share their work with the public; and
- Offering programs and services that educate and entertain students and the general public.

## Oregon Historical Society Strategic Plan 2014- 2018

The overall purpose of this plan is to build on the momentum created in the past three years by continuing the goals of visibility, financial stability and quality.

During the next five years, OHS will be widely known as the “Oregon” Historical Society, by continuing to serve all of Oregon through its programs, services, website improvements, and outreach efforts. Financial stability will be reached with a three-pronged effort: 1) public funding will continue to be a priority, 2) aggressive fundraising campaigns to develop additional resources to support improvements in programs and services, and 3) wisely investing Board designated funds and endowments. Quality will be a hallmark of exhibitions, programs, services, and facilities that will continue OHS’ standing as one of the finest historical societies in the nation.

The 2014 – 2018 strategic plan will present a summary page of the six (6) goals and objectives, and the full detailed plan with goals, objectives, action plans, timelines, resources needed, and staff responsibilities.

### OHS Goals, 2014-2018

**GOAL 1.** Engage and work with the public to explore Oregon’s history through high-quality, creative projects that reach across the state to help people make informed decisions today and tomorrow.

**GOAL 2.** Fulfill OHS’s role as stewards of Oregon history while setting a standard of excellence in access to collections of historical artifacts and documents, use of technology, and professional practice and care.

**GOAL 3.** Create a more stable, sustainable, and secure financial condition through the renewal & stewardship of public funds, building reserves, increasing endowments, and exploring new revenue opportunities & special funding initiatives.

**GOAL 4.** Create a plan for realizing the usage potential of OHS real estate holdings that anticipates needs and opportunities in using space to achieve organizational goals.

**GOAL 5.** Create a workplace culture that prioritizes collaboration among departments, efficient use of resources, and job satisfaction.

**GOAL 6.** Align resources for continued improvements in information technology and digital advancement.

## **OHS Goals and Objectives 2014-2018**

### **GOAL 1. Engage and work with the public to explore Oregon's history through high-quality, creative projects that reach across the state to help people make informed decisions today and tomorrow.**

- 1.1 Establish and sustain a unified system of evaluation to provide ongoing data to OHS about the success of its creative projects.
- 1.2 Increase the capacity of OHS staff to select, develop, implement and evaluate new creative projects.
- 1.3 Complete a multi-year Gallery Improvement plan to maximize usage of all interpretive areas in alignment with developing OHS's creative priorities.
- 1.4 Establish a long-term (2-3 year) creative project schedule to allow increased efficiency of marketing, fundraising and creative development.
- 1.5 Develop creative projects with input from, and accessibility for, Oregon's rapidly evolving populations around the state.
- 1.6 Steward a continuous marketing and communications program that increases awareness of OHS products and services throughout the state.

### **GOAL 2. Fulfill OHS's role as stewards of Oregon history while setting a standard of excellence in access to collections of historical artifacts and documents, use of technology, and professional practice and care.**

- 2.1 Enhance overall collections management and preservation efforts through collaboration among OHS collection staff.
- 2.2 Secure stable staffing and funding for collections management and preservation.
- 2.3 Build staff capacity for collections management and preservation activities.
- 2.4 Increase access to and awareness of OHS collections as a resource for all Oregonians.
- 2.5 Organize the OHS Institutional Archives and create a sustainable records management plan for OHS.

### **GOAL 3. Create a more stable, sustainable, and secure financial condition through the renewal & stewardship of public funds, building reserves, increasing endowments, and exploring new revenue opportunities & special funding initiatives.**

- 3.1 Strengthen and steward relationships with county commissioners, the Multnomah

- County oversight committee, state legislators, government officials and their constituents.
- 3.2 Encourage policies and decisions that build reserves and encourage the achievement of a \$5-6 million reserve account to provide protection from economic downturns and/or erratic public funding.
  - 3.3 Create an institution that presents itself as worthy of endowment. Define and articulate endowment opportunities for the institution. Build relationships with those who can make leadership gifts today and/or within an estate plan.
  - 3.4 In a timely fashion, identify and pursue giving initiatives for the institution that both inspire prospective donors to engage and further the goals and objectives of our mission.
  - 3.5 Nurture a culture of philanthropy that includes staff, board, members, donors, partners, volunteers, and visitors.

**GOAL 4. Create a plan for realizing the usage potential of OHS's real estate holdings that anticipates needs and opportunities in using space to achieve organizational goals.**

- 4.1 Create a master site plan for potential 2020 implementation, on or off the Park Blocks, which optimizes financial return and strategic space applications.
- 4.2 Assess OHS' current and potential internal physical space needs for downtown and Gresham facilities and create a space plan to strategically accommodate changing needs.
- 4.3 Continue to address deferred maintenance needs and be proactive in repair work for both downtown and Gresham facilities.
- 4.4 Upgrade the first floor of downtown facility to match the look and feel of the newly renovated Pavilion.
- 4.5 Renovate the Library to be the first class facility in appearance and access that matches OHS' superb collection, if Action Step 2.1.4 comes to fruition.
- 4.6 Renovate Beaver Hall into the Learning Portal, if Action Step 1.3.1b comes to fruition.

**GOAL 5. Create a workplace culture that prioritizes collaboration among departments, efficient use of resources, and job satisfaction.**

- 5.1 Staff, volunteers, and board members share a realistic vision for the institution that is developed through feedback processes, articulates clear priorities and roles for everyone, and is in alignment with our resources.

- 5.2 OHS strengthens overall capacity and practices leadership development by establishing systems for all staff to work both within and across departments to identify challenges and to propose and implement solutions.
- 5.3. System exists for monitoring and improving job satisfaction.
- 5.4. A culture of transparency exists regarding ongoing decision-making, planning, reporting, and budgeting processes.

**GOAL 6. Align resources for continued improvements in information technology and digital advancement. Establish institution-wide IT infrastructure that is safe and secure and offers opportunities for innovative project development.**

- 6.1 Continue to address technology needs and be proactive on needed repairs and upgrades within available resources.
- 6.2 Establish an equipment upgrade/replacement/rotation schedule.
- 6.3 Website enhancement.

## Strategic Plan 2014 - 2018

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
GOAL 1 - Engage and work with the public to explore Oregon's history through high-quality, creative projects that reach across the state to help people make informed decisions today and tomorrow.												
Objective 1.1 - Establish and sustain a unified system of evaluation to provide ongoing data to OHS about the success of its creative projects.												
Action Step 1.1.1 - Create an interdepartmental work group to craft a creative 3-yr evaluat plan, Board involvement will occur through Program and Collection Committee work.												
1.1.1a	x	x	x	x	x	Lead: Museum Director, Library Director, OHQ Editor						a. Group met quarterly, beginning in June 2014
Action Step 1.1.2 - Interdepartmental group prepares a 1-2 page report (i.e., white paper) to help inform development of creative projects.												
1.1.2a	x	x	x	x	x	Lead: Museum Director, Library Director, OHQ Editor						a. White paper is generated/circulated by April 2015, each April thereafter
Objective 1.2 - Increase the capacity of OHS staff to select, develop, implement and evaluate new creative projects.												
Action Step 1.2.1 - Identify areas of creative development that need additional capacity.												
1.2.1.a		x				Lead: Library Director, Library Director, OHQ Editor						a. Completed/circulated 1-2pg report identifying areas where capacity can be increased to accommodate new projects
Objective 1.3 - Complete a multi-year Gallery Improvement plan to maximize usage of all interpretive areas in alignment with developing OHS' creative priorities.												
Action Step 1.3.1 - Create an interdepartmental work team to review data gathered (Ambassador program, staff listening sessions, etc.) and create plan.												
1.3.1.a		x				Lead: Museum Director, Library Director, OHQ Editor						a. 4yr gallery improvement plan is created and presented
1.3.1b		x				Lead: Museum Director, Library Director, OHQ Editor						b. Funded and developed OHS Learning Portal, to open in Fall 2015
Objective 1.4 - Establish a long-term (2-3 year) creative project schedule to allow increased efficiency of marketing, fundraising and creative development.												
Action Step 1.4.1 - Hold quarterly meetings to review creative project plans as they relate to selection, implementation and evaluation.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
1.4.1.a	x	x	x	x	x	<b>Lead: Museum Director,</b> Library Director, OHQ Editor						a. First quarterly meeting held in Fall 2014, and every quarter thereafter
1.4.1b	x	x	x	x	x	<b>Lead: Museum Director,</b> Library Director, OHQ Editor						a. Held creative projects summit (1/2 day) in May 2015 and created a comprehensive project schedule by June of each year (beginning in 2015)
Action Step 1.4.2 - Develop educational programming to engage, inspire and cultivate young visitors-as they will become the institution's future visitors, donors and content providers.												
1.4.2.a	x	x	x	x	x	<b>Lead: Museum Director,</b> Education and School Services Manager						a. Funded and developed OHS Learning Portal. Opens by Fall 2015 (See 1.3.1b)
Objective 1.5- Develop creative projects with input from, and accessibility for, Oregon's rapidly evolving populations around the state.												
Action Step 1.5.1 - Use data gathered from objective 1.1 to measure OHS's success in reaching and engaging diverse and state-wide audiences.												
1.5.1.a	x	x	x	x	x	<b>Lead: Museum Director,</b> Library Director, OHQ Editor						a. Defined prioritization of OHS goals relating to accessibility and engagement through Objective 1.1
1.5.1.b	x	x	x	x	x	<b>Lead: Museum Director,</b> Library Director, OHQ Editor						a. Used data gathered through Objective 1.1 to quantify OHS' success in engaging these populations/audiences
Objective 1.6- Steward a continuous marketing and communications program that increases awareness of OHS products and services throughout the state.												
Action Step 1.6.1 - Strategically employ methods and approaches that strengthen internal communication and clarity of external messaging.												



Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
1.6.1.a	x	x	x	x	x	<b>Lead: Communications and Marketing Manager</b>						a. Created comprehensive marketing plan using existing schedules, plans, and documents by end of 2014. Created annually thereafter
1.6.1b	x	x	x	x	x	<b>Lead: Communications and Marketing Manager, OHS Editor, Museum Director, Library Director</b>						b. Worked on internal communications processes in tandem with Goal 5, including internal press releases, and consistent internal events, exhibits and event calendar
1..6.1c		x	x	x	x	<b>Lead: Development Director; Communications and Marketing Manager, OHS Editor, Museum Director, Library Director</b>						c. Created OHS state-wide relevancy campaign including evolving list of current efforts, 10-12 individual stories and visual branding strategy. Ready for roll out by 2015
Action Step 1.6.2 - Establish, nurture and engage all media.												
1.6.2a	x	x	x	x	x	<b>Lead: Executive Director; Development Director, Communications and Marketing Manager</b>						a. Encourage visitors from outside the Portland Metro area through partnerships with Travel Portland and Travel Oregon and other statewide travel organizations
1.6.2b	x	x	x	x	x	<b>Lead: Executive Director; Development Director, Communications and Marketing Manager</b>						b. Establish & nurture media partnerships that optimize promotional dollars for TV, radio, electronic media and print

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
1.6.2c	x	x	x	x	x	<b>Lead: Executive Director;</b> Development Director, Communications and Marketing Manager						c. Keep an active, engaged, and continually growing social media community
1.6.2d	x	x	x	x	x	<b>Lead: Executive Director;</b> Development Director, Communications and Marketing Manager						d. Continue to use all media to drive visitors to the OHS website to optimize marketing dollars and increase usage of content materials and on-line sales opportunities
1.6.2e	x	x	x	x	x	<b>Lead: Executive Director;</b> Development Director, Communications and Marketing Manager						e. Publicize successes and expertise wherever and whenever possible
Action Step 1.6.3 - Provide promotional support to affiliates and statewide partners hosting OHS products or programs to optimize their success and promote our involvement.												
1.6.3a	x	x	x	x	x	<b>Lead: Executive Director;</b> Development Director, Communications and Marketing Manager						a. Optimized successful promotional support
GOAL 2 - Fulfill OHS's role as stewards of Oregon history while setting a standard of excellence in access to collections of historical artifacts and documents, use of technology, and professional practice and care.												
Objective 2.1 - Enhance overall collections management and preservation efforts through collaboration among OHS collection staff.												
Action Step 2.1.1 - Increase coordination between library and museum collections through regular collections staff meetings.												
2.1.1a	x	x	x	x	x	<b>Lead: Library Director,</b> <b>Museum Director</b>						a. At least four meetings per year
Action Step 2.1.2 - • Create collections work group to revise, finalize, and exercise institutional collections disaster plan.												
2.1.2a	x					<b>Lead: Library Director</b> and Archivist; <b>Museum Director;</b> Registrar; Library Technical Services <b>Manager</b>						a. Disaster plan revisions completed by end of 2014
2.1.2b		x	x	x	x	<b>Lead: Library Director</b> and Archivist; <b>Museum Director;</b> Registrar; Library Technical Services <b>Manager</b>						b. Plan reevaluated by work group on an annual basis
2.1.2c		x	x	x	x	<b>Lead: Library Director</b> and Archivist; <b>Museum Director;</b> Registrar; Library Technical Services <b>Manager</b>						b. Staff trainings and exercises delivered on schedule determined by work group.
Action Step 2.1.3 - Create an interdepartmental work group to evaluate and establish priorities for enhancing the physical environment in collections areas.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.1.3a	x	x				<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						a. Group formed by July 2014
2.1.3b	x					<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						b. Produce work plan by June 31, 2014
Action Step 2.1.4 - Enhance the library's physical environment to create a more functional and attractive library space. Work with Development Director to create a capital campaign for desired improvements.												
2.1.4a	x	x	x	x	x	<b>Lead: Library Director</b>						a. Form a library staff committee to plan for library renovation. Meet at least 2 times per year prior to completion of renovation
2.1.4b		x				<b>Lead: Development Director;</b> Library Director; and Marketing & Communications Manager						a. Raise funds to cover cost for architectural plans and other planning documents by June 2015
2.1.4c			x			<b>Lead: Development Director;</b> Library Director; and Marketing & Communications Manager	Cost to be determined when plans are finalized	Cost to be determined when plans are finalized				b. Launch campaign to fund Belluschi Center in Jefferson Room area
2.1.4d		x				<b>Lead: Development Director;</b> Library Director; and Marketing & Communication Manager		Cost to be determined when plans are finalized	Cost to be determined when plans are finalized			c. Launch campaign to fund remainder of library renovation
Action Step 2.1.5 - Identify criteria, prioritize collections and secure funding for targeted processing, cataloging, digitization, and preservation projects as determined by staff committees.												
2.1.5a	x	x	x	x	x	<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						a. Museum and library staff to meet regularly to develop plans
2.1.5b	x	x	x	x	x	<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						b. Funding secured for one project per year for library and museum each
Action Step 2.1.6 - Continue to prioritize cataloging of incoming collections.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.1.6a	x	x	x	x	x	<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						a. Ongoing through 2018
Action Step 2.1.7 - Develop digital preservation plan, policies, and procedures for creating, storing, and providing access to digital materials.												
2.1.7a	x	x				<b>Lead: Library Director, Archivist; Museum Director; Library Technical Services Manager; IT Director</b>						a. Policies and procedures developed by July 2014
2.1.7b		x				<b>Lead: Library Director, Archivist; Museum Director; Library Technical Services Manager; IT Director</b>						b. Long-range plan completed by July 2015
2.1.7c		x	x			<b>Lead: Library Director, Archivist; Museum Director; Library Technical Services Manager; IT Director</b>						c. Fundraising for infrastructure completed by end of 2016
Objective 2.2 - Secure stable staffing and funding for collections management and preservation.												
Action Step 2.2.1. Develop a long range collections staffing plan.												
2.2.1a	x					<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						a. Develop a staffing plan by August 2014
2.2.1b	x					<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)	Cost to be determined when creating 2015 budget					b. Submit budget requests for new or altered positions when submitting 2015 budget
Action Step 2.2.2 - Museum and library develop a priority list of endowed staff positions.												
2.2.2.a	x					<b>Lead: Library Director</b> (for library) <b>Lead: Museum Director</b> (for museum)						a. List developed by July 2014
2.2.2.b	x	x				<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); Director of Development						b. Library Director and Museum Director will work with Development Director from fall 2014 to spring 2015 to develop fundraising strategies
Objective 2.3 - Build staff capacity for collections management and preservation activities.												
Action Step 2.3.1 - Evaluate and improve procedures and workflow and upgrade technological resources to increase efficiency.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.3.1.a	x	x				<b>Lead: Library Director</b> and Library Technical Services <b>Manager</b> (for library); <b>Lead: Museum Director</b> (for museum)						a. Include workflow procedures in digital preservation plan (see 2.1.7a)
2.3.1.b		x				<b>Lead: Library Director;</b> Library Technical Services Manager		Cost for purchasing software and migrating data do be determined				b. Evaluate feasibility of using a new collections management tool for library, such as Archives Space -- evaluation to be completed by July 2015
2.3.1.c		x				<b>Lead: Library Director, Museum Director;</b> Registrar; Library Technical Services Manager						c. Evaluate services to researchers and update procedures to enhance efficiency, flexibility, collections preservation, and customer service by December 2015
2.3.1.d		x	x	x	x	<b>Lead: Museum Director</b>						d. Completion of "Big Fix" project for museum by 2018
Action Step 2.3.2 - Create a plan and budget for staff development that addresses current and future needs.												
2.3.2.a	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum)	Budget determined by plan	Budget determined by plan	Budget determined by plan	Budget determined by plan	budget determined by plan	a. Develop plan by August 2014 that includes professional development opportunities, such as professional conferences, training webinars, and in-person workshops
2.3.2.b	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum)	Budget determined by plan	Budget determined by plan	Budget determined by plan	Budget determined by plan	Budget determined by plan	b. Library and Museum budgets for 2015-2018 to include professional development funds per plan
Objective 2.4 - Increase access to and awareness of OHS collections as a resource for all Oregonians.												
Action Step 2.4.1 - Identify and evaluate existing access points, including the collections online catalog and OHS website, and recommend improvements.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.4.1.a		x				<b>Lead: Library Director</b> , Library Technical Services Manager (for library); <b>Lead: Museum Director</b> (for museum); Marketing and Communications Manager						a. Evaluation and plan presented to board IT committee by March 2015
2.4.1.b				x		<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); IT Director		Cost to be determined by plan	Cost to be determined by plan	Cost to be determined by plan		b. Recommendations implemented by end of 2017
Action Step 2.4.2 - Create unified plan to make available existing OHS digital images not previously made public.												
2.4.2.a		x				<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); IT Director		Cost determined by plan	Cost to be determined by plan	Cost to be determined by plan		a. Plan completed by July 2015
Action Step 2.4.3 - Identify uses of OHS collections, both internally and externally.												
2.4.3.a	x	x				<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum)						a. Ongoing throughout 2014-2015
Action Step 2.4.4 - Through staff trainings and other opportunities, increase interdepartmental awareness of collections and how they are used.												
2.4.4.a	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum)						a. Educate general OHS staff through library and museum orientations and other forums
Action Step 2.4.5 - Create work group including marketing manager, programs manager, and collections staff to develop a multifaceted publicity plan to raise the public visibility of OHS collections throughout the state.												
2.4.5.a	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); Marketing & Communications Manager						a. Work group to meet at least 3 times per year
2.4.5.b	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); Marketing & Communications Manager						b. Increase use of OHS publications, digital projects, website, and social media to promote OHS collections statewide -- ongoing through 2018

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.4.5.c	x	x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); Marketing & Communications Manager						c. Showcase OHS collections through internal and external events -- ongoing through 2018
2.4.5.d		x	x	x	x	<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum); Marketing & Communications Manager		Cost of Ambassador Program yet to be determined	Cost of Ambassador Program yet to be determined	Cost of Ambassador Program yet to be determined	Cost of Ambassador Program yet to be determined	d. Incorporate collections information in Ambassador Program sessions
Action Step 2.4.6 - Work with educators and other groups to inform students and other potential users of OHS collection resources.												
2.4.6a		x	x			<b>Lead: Library Director;</b> OHP/OE Project Manager; (for library); <b>Lead: Museum Director</b> (for museum); Education and School Services Manager						a. Develop a plan to utilize OHP, OE, and other resources to reach out to educators, to be completed by June 30, 2015; plan implemented by June 30, 2016
Action Step 2.4.7 - Use data gathered in Goal 1.1 to develop and prioritize improvements to collections access and outreach programs and services.												
2.4.7a			x			<b>Lead: Library Director</b> (for library); <b>Lead: Museum Director</b> (for museum)						a. Recommendations compiled by the end of 2016
Objective 2.5 - Organize the OHS Institutional Archives and create a sustainable records management plan for OHS.												
Action Step 2.5.1 - Organize and evaluate current OHS Institutional Archives Holdings.												
2.5.1.a	x					<b>Lead: Library Director;</b> volunteers						a. Library Director and volunteers to survey exiting holdings and record locations by end of 2014
2.5.1.b		x				<b>Lead: Library Director;</b> CFO; volunteers						b. Organize OHS Archives into appropriate series by June 30, 2015
Action Step 2.5.2 - Develop a records management plan for OHS.												
2.5.2.a		x				<b>Lead: Library Director;</b> CFO						a. Records management plan in place by end of 2015

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
2.5.2.b					x	<b>Lead: IT Director;</b> Library Director; CFO						b. An interdepartmental working group to develop a plan for retention and preservation of electronic OHS records by end of 2018
<b>GOAL #3 - Create a more stable, sustainable, and secure financial condition through the renewal &amp; stewardship of public funds, building reserves, increasing endowments, and exploring new revenue opportunities &amp; special funding initiatives.</b>												
<b>Objective 3.1 -Strengthen and steward relationships with county commissioners, the MC oversight committee, state legislators, government officials and their constituents.</b>												
<b>Action Step 3.1.1 - Meet with MC Commissioners-quickly and positively respond to their requests.</b>												
3.1.1a	x	x	x	x	x	<b>Lead: Executive Director</b>						a. One-on-one contacts annually; invitations to OHS events
<b>Action Step 3.1.2 - Attend Levy Oversight Committee meetings and quickly respond to all requests for follow-up.</b>												
3.1.2a	x	x	x	x	x	<b>Lead: Executive Director</b>						a. Quarterly meetings per year/regular phone & mail communication
<b>Action Step 3.1.3 - Meet with East County Historical Societies to discuss their support for LEVY renewal.</b>												
3.1.3a	x	x	x	x	x	<b>Lead: Executive Director</b>						a. 1-2 times per year
<b>Action Step 3.1.4 - Invite Legislators &amp; County Commissioners to OHS events, exhibits &amp; tours, provide Historian &amp; other regular communication.</b>												
3.1.4a	x	x	x	x	x	<b>Lead: Executive Director</b>						a. Tours done; regularly communicated with elected officials
<b>Action Step 3.1.5 - Frequent visits to Salem during budget sessions to encourage and thank Legislators for support - on-going.</b>												
3.1.5a	x	x	x	x	x	<b>Lead: Executive Director</b>						a. Done once a month or more as needed during session
<b>Action Step 3.1.6 - Design, produce and PROMOTE Statewide Programs.</b>												
3.1.6a	x	x	x	x	x	<b>Leads: Executive Director; Communications &amp; Marketing Manager, Museum Director, Public Programs Manager</b>	% of operating budget & special funding	same	same	same	same	a. Successful Teddy Roosevelt Road Show, National History Day, Traveling Exhibits, Traveling Trunks, and expanded Website content



Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
Objective 3.2 - Encourage policies and decisions that build reserves and encourage the achievement of a \$5 to \$6 million reserve account to provide protection from economic downturns and/or erratic public funding.												
Action Step 3.2.1 - Encourage board participation in planned giving activities.												
3.2.1a	x	x	x	x	x	Lead: Executive Director & Development Director						a. Board and Board prospects attended events
Action Step 3.2.2 - Produce two to three workshops for estate planning professionals to promote the worthiness of OHS for estate gifts and bequests.												
3.2.2.a	x	x	x	x	x	Lead: Development Director	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	a. Completed workshops
Action Step 3.2.3 - Continue with one to two Legacy Club events for prospects each year.												
3.2.3.a	x	x	x	x	x	Lead: Development Director	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	a. Completed events
Action Step 3.2.4 - Identify planned giving prospects in the Raisers Edge database and ensure that they are provided with Legacy Club information.												
3.2.4.a	x	x	x	x	x	Lead: Development Director						a. Completed mailings
Objective 3.3 Create an institution that presents itself as worthy of endowment. Define and articulate endowment opportunities for the institution. Build relationships with those who can make leadership gifts today and/or within an estate plan (the same action steps noted in 3.2 supports this objective as well).												
Action Step 3.3.1 - Identify a major gifts list and "development steps" for each prospect during the year to build relationships and encourage larger gifts.												
3.3.1.a	x	x	x	x	x	Lead: Development Director						a. Renewed and new major gifts of \$1,000+
Action Step 3.3.2 - Help define projects that upgrade the institution's physical presence as well as its expertise and service.												
3.3.2.a	x	x	x	x	x	Lead: Development Director	TBD	TBD	TBD	TBD	TBD	a. Annually identified and explored prospects
Action Step 3.3.3 - Define and produce endowment "case statements" for leadership positions.												
3.3.3.a	x					Lead: Development Director						a. Produced statements
Objective 3.4 In a timely fashion, identify and pursue giving initiatives for the institution that both inspire prospective donors to engage and further the goals and objectives of our mission.												
Action Step 3.4.1 - Continue the cultivation of the 1898 Gift Club.												
3.4.1.a	x	x	x	x	x	Lead: Development Director						a. Completed mailings and events
Action Step 3.4.2 - Continue the cultivation of Corporate partnerships through gift clubs, co-marketing and exhibit sponsorships.												
3.4.2.a	x	x	x	x	x	Lead: Development Director						a. Renewed and added Corporate partners
Action Step 3.4.3 - Produce engagement and giving events for donors such as the History Makers Dinner, historian dinners, and special tours.												
3.4.3.a	x					Lead: Development Director						a. Completed events

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
Action Step 3.4.4 - Retain and renew current members each year.												
3.4.4.a	x	x	x	x	x	Lead: Development Director; COO						a. Members renewed
Action Step 3.4.5 - Continue to add new members.												
3.4.5.a	x	x	x	x	x	Lead: Development Director; COO						a. New members added
Action Step 3.4.6 - Continue to convert members into annual fund donors.												
3.4.6a	x					Lead: Development Director						a. Focused on members who give over membership dues
Action Step 3.4.7 - Continue to upgrade donors and encourage higher levels of giving.												
3.4.7a	x	x	x	x	x	Lead: Development Director						a. Donors upgraded
Objective 3.5 Nurture a culture of philanthropy that includes staff, board, members, donors, partners, volunteers, and visitors.												
Action Step 3.5.1 - Continue monthly development report that communicates fundraising successes and initiatives and recognizes board members and staff who participate in the development process.												
3.5.1.a	x	x	x	x	x	Lead: Development Director						a. Completed monthly reports
Action Step 3.5.2 - At every board meeting have a cultivation activity for board members to accomplish.												
3.5.2.a	x	x	x	x	x	Lead: Development Director						a. Cultivation activity offered at board meetings
Action Step 3.5.3 - Meet once a year with each board member to talk about cultivation activities. Engage the Development Committee as an active partner in fundraising.												
3.5.3.a	x	x	x	x	x	Lead: Development Director						a. Meetings completed and more board members engaged in activities
Action Step 3.5.4 - Attend staff meetings to update and encourage employees to engage in development activities.												
3.5.4.a	x	x	x	x	x	Lead: Development Director						a. Attended staff and department meetings
Action Step 3.5.5 - Work with staff and partners to facilitate and manage the grant process.												
3.5.5.a	x	x	x	x	x	Lead: Development Director						a. Worked on more program specific requests with staff involvement
Action Step 3.5.6 - Communicate to visitors that OHS depends on public and private support.												
3.5.6a	x	x	x	x	x	Lead: Development Director; COO						a. Communicated with front line staff, volunteers, and docents on importance of support

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
<b>GOAL 4 - Create a plan for realizing the usage potential of OHS real estate holdings that anticipates needs and opportunities in using space to achieve organizational goals.</b>												
Objective 4.1 - Create a master site plan for potential 2020 implementation, on or off the Park Blocks, which optimizes financial return and strategic space allocations.												
Action Step 4.1.1 - Study past site plans and extract possible considerations that may fit into the future plans of OHS.												
4.1.1a	x					<b>Lead: COO &amp; Master Site Plan Committee</b>						a. Information extracted and considered 2014
Action Step 4.1.2 - Evaluate current usage of the property; discuss scenarios of building up, building out, and/or utilizing existing space more efficiently to produce additional revenue sources.												
4.1.2a	x	x				<b>Lead: COO &amp; Master Site Plan Committee</b>						a. Scenarios evaluated and considered 2015
Action Step 4.1.3 - Present scenarios to Board, staff and volunteers for input.												
4.1.3a			x			<b>Lead: Executive Director</b>						a. Presentations done in 2016
Action Step 4.1.4 - Hire an outside consultant to research and develop a master site plan; taking the future developments of the whole Park Block into consideration as well as the physical internal space needs.												
4.1.4a			x	x		<b>Lead: COO &amp; Master Site Plan Committee</b>						a. Master site plan completed 2017
Action Step 4.1.5 - Master site plan presented to Board, staff and volunteers.												
4.1.5a					x	<b>Lead: Executive Director</b>						a. Presentation done 2018
Action Step 4.1.6 - If master site plan approved, plan and mount major capital campaign.												
4.1.6a					x	<b>Lead: Development Director</b>						a. Started plans for capital campaign
Objective 4.2 - Assess OHS' current and potential internal physical space needs for downtown and Gresham facilities and create a space plan to strategically accommodate changing needs.												
Action Step 4.2.1. - Assess long-term space needs with input from each department.												
4.2.1a	x					<b>Lead: COO &amp; Management Team</b>						a. Meetings held; input received
Action Step 4.2.2 - Conduct in-house study to identify spaces available; streamline existing space usage.												
4.2.2.a	x	x				<b>Lead: COO &amp; Facilities Manager; Management Team</b>						a. Done in 2015
Action Step 4.2.3 - Move storage to newly available spaces in the Gresham facility.												
4.2.3.a			x			<b>Lead: COO &amp; Facilities Manager; Management Team</b>						a. Move completed
Action Step 4.2.4 - Renovate workshop in the central corridor to move IT equipment and personnel from current unsuitable location.												
4.2.4a			x	x		<b>Lead: COO &amp; Facilities Manager; IT Director</b>						a. Renovation and move completed

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
Action Step 4.2.5 - Discuss renovating remainder of the central corridor storage spaces to adapt into office spaces by upgrading HVAC, lighting and interior design.												
4.2.5a					x	Lead: COO & Master Site Plan Committee						a. Discussion continues past 2018
Objective 4.3 - Continue to address deferred maintenance needs and be proactive in repair work for both downtown and Gresham facilities.												
Action Step 4.3.1 - Continue to assess needs and keep schedule of deferred maintenance and necessary upgrades current for both downtown and Gresham facilities.												
4.3.1.a	x	x	x	x	x	Lead: COO & Facilities Manager						a. Deferred maintenance schedule updated; necessary upgrades done
Action Step 4.3.2 - Continue to keep funding for deferred maintenance in annual budget and grant requests.												
4.3.2.a	x	x	x	x	x	Lead: COO & Properties & Facilities Committee (for budget funding) Lead: Development Director (for grants)						a. Budget contains funding for deferred maintenance work; grant requests sent out to grantors
Action Step 4.3.3 - Complete approved deferred maintenance projects each year.												
4.3.3.a	x	x	x	x	x	Lead: Facilities Manager						a. Approved projects completed annually
Objective 4.4 - Upgrade the first floor of downtown facility to match the look and feel of the newly renovated Pavilion.												
Action Step 4.4.1 - Obtain quote from interior designer to replace carpets and paint walls.												
4.4.1.a	x					Lead: COO						a. Quote obtained
Action Step 4.4.2 - Secure donor(s) to cover cost of interior designer, new carpet and painters, etc.												
4.2.2.a	x	x				Lead: Development Director						a. Funding secured
Action Step 4.4.3 - Renovate first floor.												
4.4.3.a		x				Lead: COO & Facilities Manager						a. New look and feel to first floor done
Objective 4.5 - Renovate the Library to be the first class facility in appearance and access that matches OHS' superb collection, if Action Step 2.1.4 comes to fruition.												
Action Step 4.5.1 - Serve as on-site project manager to consultant.												
4.5.1.a		x				Lead: CoO (to interior designer); Facilities Manager (to vendors)						a. Available to answer questions and assist
Objective 4.6 - Renovate Beaver Hall into the Learning Portal, if Action Step 1.3.1b comes to fruition.												
Action Step 4.6.1 - Serve as on-site project manager to consultant/Museum staff.												
4.6.1a		x				Lead: Facilities Manager						b. Beaver Hall renovated
GOAL 5 - Create a workplace culture that prioritizes: collaboraiton among departments, efficient use of resources, and job satisfaction.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
in access to collections, use of technology, and professional practice and care.												
Objective 5.1 -Staff, board members, and volunteers share a realistic vision for the institution that is developed through feedback processes, articulates clear priorities and roles for everyone, and is in alignment with our resources.												
Action Step 5.1.1 - Annual white paper developed by interdepartmental work group (see 1.1), is shared with staff, board, and volunteers and is used to help develop shared institutional vision and priorities.												
5.1.1a	x	x	x	x	x	Lead: Interdepartmental Work Group facilitator (TBD)						a. System developed by end of year 2014; first white paper released in 2015
Action Step 5.1.2 - Individual board members (perhaps committee chairs or executive committee members) are invited to occasional staff meetings to talk about how they see OHS challenges and opportunities, and staff members are invited to board meetings to help board members better understand the work of OHS.												
5.1.2a	x	x	x	x	x	Lead: Executive Director						a. Board member(s) invited to at least one staff meeting by end of 2014; staff invited to present at occasional board meetings; ongoing
Action Step 5.1.3 - Volunteers have regular opportunities for informational meetings with staff and are invited to offer feedback about the work of OHS.												
5.1.3a	x	x	x	x	x	Lead: Volunteer Manager; COO						a. System articulated and implemented by end of 2014; ongoing
Action Step 5.1.4 - Management Team members propose major annual projects, including budgets, to each other and work together to develop shared priorities for annual budgets. Some proposals are identified through collaborative project and planning work outlined in goals 1 and 2.												
5.1.4a		x	x	x	x	Lead: Executive Director & COO; Management Team						a. Proposals take place first two quarters of each year, budgeting in third quarter; begins in 2015
Action Step 5.1.5 -Staff working groups draft shared institutional vision and priorities; vision and priorities are derived, at least in part, from recommendations provided by evaluation work group defined in 1.1, gallery improvement work team defined in 1.4, creative project team outlined in 1.6, collections work group outlined in 2.1, and awareness work group outlined in 2.4.												
5.1.5a		x				Lead: Executive Director & COO; Public Outreach Manager & Library Technical Services Manager						a. June through December 2015; Shared vision articulated by end of 2015
Objective 5.2 - OHS strengthens overall capacity and practices leadership development by establishing systems for all staff to work both within and across departments to identify challenges and to propose and implement solutions.												
Action Step 5.2.1 - All-staff meeting time is used for decision-making input, project planning, budget planning, cross-training, and other avenues of collaborative work.												
5.2.1a	x	x	x	x	x	Lead: Executive Director & COO						a. Changes implemented in 2014; ongoing
Action Step 5.2.2 - interdepartmental work group, including both management and non-management staff, is empowered to develop and propose system through which staff												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
can identify challenges, propose solutions, and receive approval or feedback on proposal.												
5.2.2a	x	x	X	X	X	<b>Lead: Executive Director &amp; COO</b>						a. Work group organized by June 2014; system proposed by end of 2014; system adopted by June 2015
Action Step 5.2.3 - Managers ensure staff are provided time away from regular duties to participate in this work.												
5.2.3a	x	x	x	x	x	<b>Lead: Executive Director; Management Team</b>						a. Action step accomplished
Action Step 5.2.4 - Managers at all levels participate in management education and training opportunities that enable them to more productively recruit, hire, train, and oversee staff, including identifying and enabling leadership development.												
5.2.4a	x	x	x	x	x	<b>Lead: HR Manager &amp; COO</b>	workshop costs	workshop costs	workshop costs	workshop costs	workshop costs	a. Training opportunities provided
Objective 5.3 - System exists for monitoring and improving job satisfaction.												
Action Step 5.3.1 - Feedback opportunities, including surveys, are established on a regular basis, providing baseline of job satisfaction and opportunity for staff to identify challenges and offer solutions.												
5.3.1a	x	x	x	x	x	<b>Lead: HR Manager; Management Team</b>	survey costs	survey costs	survey costs	survey costs	survey costs	a. Implemented by end of 2014; ongoing
Action Step 5.3.2 - Management makes commitment and is equipped with the proper professional development training to respond positively to survey information and other staff feedback.												
5.3.2a	x	x	x	x	x	<b>Lead: HR Manager &amp; COO</b>	training costs	training costs	training costs	training costs	training costs	a. Management training by end of 2014; ongoing
Objective 5.4 - A culture of transparency exists regarding ongoing decision-making, planning, reporting, and budgeting processes.												
Action Step 5.4.1 - A shared calendar and resource folder are available to all staff on the network.												
5.4.1a	x	x	x	x	x	<b>Lead: COO</b>						a. Implemented by end of 2014; ongoing
Action Step 5.4.2 - Cross-training, job-shadow, and staff-education opportunities exist to help staff understand each other's work (examples could include staff invitations to docent training, early-morning press opportunities, tours with docents or Kerry, collections processing project, library orientation, and GSF tours).												
5.4.2a	x	x	x	x	x	<b>Lead: HR Manager; COO, Management Team</b>						a. At least 2 opportunities created during 2014 with clear goals for following years; ongoing
Action Step 5.4.3 - Ongoing processes are created for sharing and understanding financial information and for developing budgets.												
5.4.3a	x	x	x	x	x	<b>Lead: CFO; Management Team</b>						a. Implemented in 2014; ongoing
Action Step 5.4.4 - Through staff trainings and other opportunities, increase interdepartmental awareness of collections and how they are used.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
5.4.4a	x	x	x	x	x	<b>Lead: HR Manager &amp; COO;</b> Library Director (for library) Dir. Of Museum Svcs (for museum)						a. Educate general OHS staff through library and museum orientations and other forums
Action Step 5.4.5 - Departments and/or working groups (such as the creative project team) define individual missions and goals and share them with each other.												
5.4.5a		x	x	x	x	<b>Lead: Executive Director &amp; COO</b>						a. Missions and Goals developed by June 2015; ongoing
Action Step 5.4.6 - Additional action steps developed in early 2016, after development of shared vision and priorities and testing of new processes for doing shared, cross-department work.												
GOAL 6 - Align resources for continued improvements in information technology and digital advancement. Establish institution-wide IT infrastructure that is safe and secure, aligned with resources, and offers opportunities for innovative project development.												
Objective 6.1 -Continue to address technology needs and be proactive on needed repairs and upgrades within available resources.												
Action Step 6.1.1 - Move all users/computers over to Windows 7.												
6.1.1a	x					<b>Lead: Director of IT</b>	\$19,808					a. Completed by 7/1/2014
Action Step 6.1.2 - Create video of "Windows on America" for educational and promotional uses.												
6.1.2a	x					<b>Lead: Director of IT and Communications/Marketing manager;</b> Executive Director; Education Manager; Museum Director; COO						a. Completed by 6/1/2014
Action Step 6.1.3 - Replace Galaxy Server (museum ticketing application) with latest version, stay current.												
6.1.3a	x	x	x	x	x	<b>Lead: Director of IT;</b> Development Director; Marketing Manager; COO						a. Galaxy server replaced by fall of 2014; on-going to stay current updates and with feedback from group
Action Step 6.1.4 - Replace Blackbaud Server (Membership and Accounting); update Raiser's Edge and Financial Edge to latest versions.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
6.1.4a	x	x	x	x	x	<b>Lead: Director of IT;</b> Development Director; CFO; COO						Replace Blackbaud Server Summer of 2014 (Membership and Accounting); stay current with continued updates for Raiser's Edge and Financial Edge to latest versions.
Action Step 6.1.5 - Enhance firewall.												
6.1.5a	x	x	x	x	x	<b>Lead: Director of IT</b>						a. Firewall enhanced and kept up to date
Action Step 6.1.6 - Update collections management software.												
6.1.6a	x	x	x	x	x	<b>Lead: Director of IT;</b> Museum Director						a. Current with updates and feedback from group
Action Step 6.1.7 - Update Library collections server and software.												
6.1.7a	x	x	x	x	x	<b>Lead: Director of IT;</b> Director of Library						a. Replaced server and updated to most current version. Keeping current
Action Step 6.1.8 - Install touchscreen computer for Volunteer software. To be installed in Volunteer/Employee lounge.												
6.1.8a	x					<b>Lead: Director of IT;</b> Administrative, Volunteer & Events Manager						a. In place by 6/1/2014
Action Step 6.1.9 - Upgrade downtown security system and install security system for GSF.												
6.1.9a	x	x				<b>Lead: Director of IT;</b> Security Manager; Facilities Manager; Chief Operations Officer						a. Bids in Spring/Summer 2014, installed GSF by end of 2014, continued enhancements
Action Step 6.1.10 - Move digital files that are currently on CD's to some type of storage array.												
6.1.10a		x	x			<b>Lead: Director of IT;</b> Museum Director; Library Director		\$10,000 - \$15,000				a. In place in 2015 - 2016
Objective 6.2 - Establish an equipment upgrade/replacement/rotation schedule.												
Action Step 6.2.1- Meet with department heads every four to six months regarding technology needs and planning.												
6.2.1a	x	x	x	x	x	<b>Lead: Director of IT;</b> department managers						a. Feedback received from meetings on an annual basis
Action Step 6.2.2 - Set up a rotation schedule for desktop and servers.												



Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
6.2.2a	x	x	x	x	x	<b>Lead: Director of IT</b>						a. Schedule with timeline created for annual update
Action Step 6.2.3 - Update schedule with input from department heads.												
6.2.3a	x	x	x	x	x	<b>Lead: Director of IT;</b> department heads						a. Schedule updated with outcome from meetings annually
Objective 6.3 - Website enhancements.												
Action Step 6.3.1 - Hire Webmaster.												
6.3.1a	x					<b>Lead: Director of IT;</b> Communications/Marketing manager; Human Resources; OEP & OHP manager						a. In place by 3/1/2014
Action Step 6.3.2 - Website face lift per Digital Communications Committee recommendations and department input.												
6.3.2a	x	x	x	x	x	<b>Lead: Director of IT;</b> Webmaster; Communications/Marketing manager						a. Phase 1 of 3 phases completed in 2014; Phase 2-3 completed in 2015; on-going annually to keep up to date with technology changes
Action Step 6.3.3 - Set up an online store.												
6.3.3a		x	x			<b>Lead: Webmaster; Director of IT;</b> Chief Operations Officer						a. Online store in place, selling product end of 2015-2016
Action Step 6.3.4 - Online giving.												
6.3.4a	x					<b>Lead: Director of IT;</b> Development Director; Webmaster; Marketing Manager						a. In place by 10/1/2014
Action Step 6.3.5 - Integrate internal systems to make them more transparent to the end user.												
6.3.5a		x	x	x	x	<b>Lead: Webmaster; Director of IT;</b> Director of Library; OEP/OHP Manager; Museum Director						a. On-going annually to keep up to date with technology changes
Action Step 6.3.6 - Integrate more social media with OHE website.												

Action Item	Year					Responsible Parties	(Cost)/Revenue					Measurements
	2014	2015	2016	2017	2018		2014	2015	2016	2017	2018	
6.3.6a		x	x	x	x	<b>Lead: Communications\Marketing manager;</b> Webmaster; Director of IT; Public Outreach Manager						a. On-going annually to up to date with technology changes
Action Step 6.3.7 - Bring Artifacts Collection online, make available to the public.												
6.3.7a		x				<b>Lead: Director of IT;</b> Webmaster; Museum Director						a. Collection live and online in 2015
Action Step 6.3.8 - System in place for recording and preserving public programs and making them available online.												
6.3.8a		x	x	x	x	<b>Lead: Webmaster; Director of IT;</b> Communications\Marketing Manager; Public Outreach Manager; Library Archivist						a. Due diligence for options and costs and timeline done; upkeep thereafter

*Please Note: It is the responsibility of the lead person(s) to make sure other non-listed employees are involved in the action steps, where appropriate, up to and including all staff.*

## **STRATEGIC PLANNING LEADERSHIP**

### **Senior Management Team**

Kerry Tymchuk, Executive Director

Eliza E. Canty-Jones, Editor, *Oregon Historical Quarterly*, and  
Public Outreach Manager

Brian Carter, Museum Director

Sue Metzler, Director of Development

Sheri Neal, Chief Financial Officer

Lisa Noah, Chief Operations Officer

Dwight Peterson, Director of Information Technology & Security

Geoff Wexler, Library Director

### **Consultant**

Barb Gibbs, Nonprofit Association of Oregon