

Oregon Historical Society Strategic Framework • Draft 10-4-2018

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Notes:

If you have feedback on the Strategic Framework, please provide it to OHS’s consultant Paula Manley by 10/31. paula@paulamanley.com 503-807-9324

The final version of the Strategic Framework will incorporate quotes from a handful of board leaders and historical figures to anchor the key themes and thrusts of this plan.

An external facing executive summary will be prepared to share with stakeholders and via the OHS website.

Introduction: Being OHS

Outstanding programmatic success. Diverse partnerships. Unprecedented financial growth. Record attendance. New and continuing members. Generous donors and volunteers. Extraordinary leadership and a staff of talented professionals. An exceptional Board of Directors that has become increasingly representative of the many communities that comprise Oregon.

Our past five years have been marked by stellar accomplishments and nonstop work in service of all Oregonians.

What is required of Oregon Historical Society for the next five years?

This is a time to redouble our efforts to partner with communities across the state as we also deepen our internal capabilities to become a more diverse and inclusive institution. It is a time to leverage the power of technology to further enhance the visitor and user experience, and to become a more efficient, effective and collaborative organization. And it is a time for continued efforts to increase our visibility across Oregon, building on the positive momentum of recent years.

About the Oregon Historical Society

History is powerful: It shapes our understanding of who we are as individuals, as communities, and as a society. We draw on our understanding of history to contextualize the present and to create the future.

Founded more than a century ago, the Oregon Historical Society preserves our state's history and makes it accessible to everyone in ways that advance knowledge and inspire curiosity about all the people, places, and events that have shaped Oregon.

With a vast collection — including photographs, maps, manuscript materials, books, films, and oral histories — OHS serves as the state's collective memory. Our research library, museum, digital platforms, educational programming, and historical journal, make Oregon's history accessible to all. With strong support from both public and private sectors, we offer a broad array of programs that create meaningful opportunities for scholarship, creative projects, learning, teaching, and community building — all centered around the state's long, complex history.

Accomplishments and Challenges

Since 2011, when OHS began receiving funding from a levy approved by Multnomah County voters, we have increased membership, corporate and foundation support, and individual giving, while actively cultivating partnerships to engage diverse new audiences.

The *FORWARD!* capital campaign, launched in 2016, has inspired unprecedented financial gifts that are enabling us to create a new, permanent Oregon history exhibit, *Experience Oregon*; to renovate the world-class Research Library; and to expand the innovative Digital Vault, which preserves our most fragile documents and brings OHS collections to researchers across the globe.

Working with new community partners, we have prioritized bringing increased attention to the history of peoples that OHS, like many historical organizations, has long ignored. For example, we proudly hosted exhibits and programs focused on the histories of Oregon's Chinese and African-American communities and deeply engaged with Oregon's nine federally recognized Tribes during the creation of *Experience Oregon*. We now regularly work with diverse community partners whose advice guides many aspects of our work. This engagement has brought new audiences, researchers, members, and donors to OHS.

Along with making significant progress, OHS has experienced challenges. The cost of doing business has continued to increase. The current staff is over-extended as the institution has taken on new projects without hiring additional employees. While OHS has increased the diversity of our Board of Trustees, additional work is needed to deepen internal diversity and inclusion across the institution. Finally, our technology systems and strategy have not kept pace as demands for technology — and associated opportunities — have increased significantly.

Planning for the Next Five Years

Led by a Design Team with consultant support, the planning process engaged numerous stakeholders including Board and staff members, volunteers, educators, editorial advisory board members, the Cabinet (OHS's emerging leaders board), affiliates from around the state, members, community leaders, and national experts in public history, research libraries, archives and museums.

Informed by these diverse perspectives, the OHS Board, Senior Team, and a cross-section of staff, came together for a series of interactive sessions to focus on OHS's vision, values, strengths, barriers, and five-year strategies. Members of the Design Team and senior staff then fleshed out 18-month actionable milestones and a planning cycle for Executive Committee review and Board action. Going forward, with twice-yearly review sessions and an annual retreat, OHS will celebrate accomplishments, reflect on lessons learned, and make updates to ensure a "living plan."

Our Mission

The Oregon Historical Society preserves our state's history and makes it accessible to everyone in ways that advance knowledge and inspire curiosity about all the people, places, and events that have shaped Oregon.

Our Values

The following core values are foundational to OHS and serve as touchstones for *how* we do our work:

- **Community Building:** OHS is a community gathering space, resource, and catalyst for civic engagement that is rooted in understanding history. We foster meaningful relationships with many individuals and partners who inform and direct our work.
- **Integrity and Transparency:** OHS is committed to honest communication and transparent operations; we see this as a foundation for creating evidence-based work and for managing resources in a trustworthy and accountable manner.

- **Equity and Inclusion:** OHS seeks to redress historical exclusion by embracing an inclusive understanding of the Oregon experience. In partnership with multiple communities, we educate the public about inequities as we work to change our own institution.
- **Cultural Humility and Courage:** OHS believes that history cannot be contained within a single story or point of view. We remain humble and respect the legitimacy of different, and even conflicting, cultural perspectives. We remain courageous and bold as we explore and embrace multiple ways of knowing.
- **Accessibility:** OHS strives to provide access to everyone along the continuum of human ability and experience. With a variety of learning methods, technologies, and languages, we enable all people to experience the power of history.
- **Lifelong Learning:** OHS values questions, new ideas, and unexpected connections and discoveries that arise through inquiry. We recognize that willingness to change our minds is crucial to understanding history and applying it to the present.

Strategic Environment

Several influential trends and developments are shaping the OHS operating environment: Ubiquitous technology is re-shaping how we live, learn, and work, and how we participate in civic and cultural life. Technological change is a constant. Racial and ethnic diversity is growing, and with it comes productive pressure to create more equitable and welcoming institutions. New education requirements in Oregon have elevated the teaching of ethnic studies and tribal histories.

The funding landscape is changing with a new federal tax law, state and local budget pressures, and competition for philanthropic resources. Generational shifts are underway, creating changes in how people approach volunteering and charitable giving.

In the fields of public history and museums, a significant trend is that institutions are becoming more community-centered and are co-creating with partners – particularly with communities that have historically been excluded or marginalized. Historical institutions are increasingly bringing historical context to current issues. With the use of digital technology, they are enhancing the visitor experience and broadening accessibility beyond museum walls. Other noteworthy trends include greater use of primary sources in teaching history, and an increasing emphasis on teaching research and critical analysis skills, which are foundational for a democratic society.

Our Vision

We foster a better tomorrow through an Oregon story that is meaningful to all Oregonians. We strive to be:

- A diverse and inclusive statewide institution that reflects the histories of all Oregonians
- A relevant and welcoming history institution that links the present with the past
- A valuable resource for anyone curious about Oregon's history
- A well-known brand and destination

Barriers to Our Vision

Potential barriers include:

- Silos and over-extended staff
- Nascent efforts with internal diversity, equity, accessibility and inclusion (DEAI)
- Under-resourced technology and fast pace of technological change
- Large size of our state and geographically separated communities

Strategic Directions and Supporting Goals, 5-Year Horizon

1. Enhance Belonging

- Continue to collaborate with communities and affiliates statewide to bring increased diversity to the history we gather and present
- Develop and implement institution-wide Diversity-Equity-Accessibility-Inclusion (DEAI) program
- Get to know our visitors and enhance the visitor experience

2. Grow our Reach and Resources

- Build on the momentum of the *FORWARD!* initiatives
- Maintain and grow our funding, including private and public support
- Become a visible and valued resource for all of Oregon

3. Proactively Embrace Technology

- Develop and execute institution-wide technology planning to: increase reach/diversity, amplify impact, and improve efficiency
- Support programs, exhibitions, education, and collections
- Maintain and update technology systems

4. Operate with Excellence

- Foster a culture of collaboration, learning, and evaluation
- Update our organizational structure and practices to align with strategic priorities
- Optimize our physical space

Planning Cycle

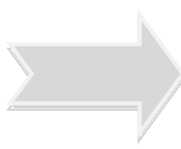

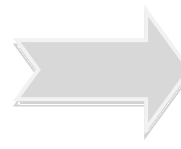
OHS's planning cycle promotes continual action, reflection, learning and accountability as we implement the strategic plan. See the Implementation Plan on pages 7- 8 for an overview of actionable milestones for the next 18 months.




Implementation Plan • January 2019 – June 2020

Note: This Implementation Plan & the 18-Month Actionable Milestones below (right column) will be streamlined based on additional input from the Board and staff in the month of October.

The Design Team, in partnership with Board and staff leadership, will review & refine a proposed final draft Strategic Framework / Implementation Plan for final Executive Committee review in November. Full Board approval is anticipated in December.

Strategic Directions and Goals (5-Year Horizon)		Actionable Milestones (Within 18 months)
(1) Enhance Belonging 	Continue to collaborate with communities statewide to bring increased diversity to the history we gather and present	Current partnerships and audiences mapped as a “baseline” to inform outreach priorities.
	Develop and implement institution-wide Diversity-Equity-Accessibility-Inclusion (DEAI) program	New affiliate partnership opportunities initiated.
	Get to know our visitors and enhance the visitor experience	Board-Staff DEAI Task Force launched; institution-wide engagement strategy and metrics developed.
(2) Grow our Reach and Resources 	Build on the momentum of the <i>FORWARD!</i> Initiatives: <ul style="list-style-type: none"> ▪ <i>Experience Oregon</i> ▪ Digital Vault ▪ Renovated Library 	Statewide awareness campaign developed for <i>Experience Oregon</i> .
	Maintain and grow our funding, including private and public support	Broad outreach to build awareness of library resources.
		Strategy developed to retain <i>FORWARD!</i> donors and members.
		OHS financial reserve strategy revisited by the Board.
	New member campaign in conjunction with <i>Experience Oregon</i> .	
(3) Proactively Embrace Technology 	Develop and execute institution-wide technology planning to: <ul style="list-style-type: none"> ▪ Increase reach/diversity ▪ Amplify impact ▪ Improve efficiency 	Three-Year Digital/IT Roadmap developed; implementation underway.
	Support programs, exhibitions, education and collections	Renovated library integrates digital and analog resources in more accessible and flexible space.

		Enhanced capacity to digitize and create access to maps and plans, oral histories, and film.
	Maintain and update technology systems	Network assessment to inform technology updates and upgrades.
		Key security measures implemented.
		Short-term staff training priorities identified and addressed.
(4) Operate with Excellence 	Foster a culture of collaboration, learning, and evaluation	Twice annual strategic plan review sessions to track progress (based on the strategic framework).
		Institution-wide review of metrics and data collection.
		Collaborative budget process implemented to ensure an institution-wide strategic lens.
	Update organizational structure and practices to align with strategic priorities	Organizational chart reviewed based on strategic priorities; plan created to realign staffing and address gaps.
		Staff workloads assessed; some projects eliminated to enable staff capacity for strategic priorities.
		Board self-assessment and committee structure update to align with strategic priorities.
	Optimize our physical space	Building space utilization and infrastructure needs identified.

Acknowledgements

The OHS strategic framework was shaped with the participation and input of many people. Special thanks to the Board of Trustees, Staff, Strategic Planning Design Team, Strategic Planning Work Group, Cabinet, Focus Group Participants (Volunteers and Educators), Field Experts and Community Leaders (Interviewees), Interviewer Team, OHS Members, Oregon Historical Quarterly Advisory Board, Oregon Encyclopedia Editorial Board, Multnomah County Levy Oversight Committee, and our affiliates across Oregon.

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