



Oral History Association  
**STRATEGIC PLAN FRAMEWORK**  
2020 – 2023 (three years)

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## INTRODUCTION

The OHA has been working on a strategic planning process since 2019. At the 2019 Annual Meeting Council engaged in a planning retreat, and we held focus groups and one-on-one interviews with members. Taking all of this into account, at our Mid-winter Meeting in Feb 2020 Council developed the following mission, vision, values, goals and strategies.

We then paused our work to respond to the crisis of the Covid-19 pandemic. Our original intention was to continue to refine success indicators for each goal, create a timeline for implementation, and prioritize our strategies before sharing this document with committees and membership for feedback, but the ongoing uncertainty and heavy workload created by the pandemic has led us to decide to share this document now, as is.

We feel that this draft plan still provides a powerful framework for our work, even as we have shifted to unanticipated tasks such as preparing to hold meetings online and developing remote recording guidelines. We are sharing this for feedback now, so that we will be ready to prioritize strategies as short, medium and long term and develop an implementation plan later this year.

***For our members:*** We invite you to read and respond to this draft, and begin to ponder how you as a member might contribute to implementing it, both in this time of crisis and in the medium to long term. We also ask you to consider how this plan serves you and all the members of the Oral History Association. In our recent [Statement on the killing of George Floyd and solidarity with Black Lives Matter](#), we

discussed the need to confront institutional racism in our institutions, and this work extends to the OHA itself. Though this strategic plan is not the only place we will describe and commit to anti-oppression work within our organization, it is important for us to address it here intentionally. So we ask you for particular feedback on the ways we've included diversity and inclusivity, how this may be lacking, and how we can improve and expand this work.

**This initial phase of feedback will be open until August 9, 2020.** Council will then review and integrate feedback from the membership and OHA committees and distribute a revised draft for membership approval in September.

## **MISSION, VISION, AND VALUES**

**Mission Statement:** The Oral History Association (OHA) is a dynamic crossroads of the many paths to and from oral history, connecting and inspiring practitioners, and supporting their work to ethically collect, preserve, share, and interpret memories which foster knowledge and respect.

**Vision Statement:** We envision a world where a deep humanistic understanding of the past, developed through a process of listening and mutual respect, shapes a more inclusive and equitable future.

### **Values Statement:**

- Respect. We advocate for a collaborative practice of oral history that values human experiences and promotes greater equity and inclusion in historical records.
- Inclusivity. We commit to creating a diverse organization that values inclusive practices, constituencies, and perspectives.
- Quality. We promote our Principles and Best Practices to guide the creation, curation, preservation, dissemination, and interpretation of oral histories.
- Sustainability. We steward our field and organization to ensure that our work is valued and accessible.
- Transparency. We ensure transparent and participatory management of our association, accountable to all individuals and communities we serve.

## **ORAL HISTORY ASSOCIATION GOALS 2020 – 2023**

**Inclusive Engagement and Participation:** The OHA is a transparent, inclusive, responsive, and valued resource with a growing body of diverse leaders and practitioners.

**Field-wide Advocacy:** The OHA is a nationally and internationally recognized advocate for oral history and a champion for the development and well-being of oral history practitioners and programs.

**Programming:** The OHA develops relevant, value-driven, and innovative programming that enhances practitioners' ability to do meaningful oral history work.

**Organizational Excellence:** The OHA leadership and executive office build a transparent and inclusive organizational structure that facilitates our mission.

**Financial Growth and Sustainability:** The OHA grows and sustains its financial foundation through prudent management of current income and investments, diversifying sources of income, and fundraising towards endowment growth.

## GOALS AND STRATEGIES 2020 – 2023

### Context from Council:

- *While goals encompass broad themes in OHA's mission and vision statements, strategies (or objectives) are sets of activities that we will undertake during the life of the plan to meet goals. Strategies most often will reflect the major elements of the goal's definition.*
- *To help us better manage the plan's work, we will assign a timeframe to every strategy. We are holding off on this until we have a better sense of our organization's workflows and capacity during the pandemic.*

**Inclusive Engagement and Participation:** The OHA is a transparent, inclusive, responsive, and valued resource with a growing body of diverse leaders and practitioners.

Strategies
Make space that addresses the needs of people of color, Indigenous people, working class people, people with disabilities, and other people practicing oral history who have historically been marginalized.
Actively develop programming, representation, and/or reciprocal relationships with organizations that will help expand the body of oral history's diverse leaders, practitioners, advocates and stakeholders.

Diversify Council and other leadership roles through thoughtful recruitment and training, transparency around governance, and an inclusive and engaged committee system.

*Possible Success Indicators (note that these are very preliminary, and need more work and attention to be finalized)*

- Greater diversity in meeting attendees
- Greater diversity in Association members
- People of Color and other marginalized groups play a central role in OHA leadership.
- Institutional culture and understanding of the field have changed through this leadership.
- # of interactions with diverse organizations/# of program collaborations developed increases by \_\_\_\_% per year
- # of OHA representatives active with key organizations sharing OHA strategies, and vice versa

**Field-wide Advocacy: The OHA is a nationally and internationally recognized advocate for oral history and a champion for the development and well-being of oral history practitioners and programs.**

#### Strategies

The OHA develops relationships with funders in order to advocate for oral history and to disseminate best practices and ethical standards.

The OHA creates and disseminates a robust suite of advocacy tools and best practices that support practitioners.

The OHA participates in a variety of decision-making spaces across community, civic, industry, governmental and academic spheres to raise awareness about the field and its needs.

*Possible Success Indicators (note that these are very preliminary, and need more work and attention to be finalized)*

- OHA is recognized source for media; media inquiries are regularly received from national outlets
- OHA advocacy results in increased achievement/attainment of tenure for practitioners
- OHA produces X new resources for practitioners each year
- OHA participates in X meetings and/or communications with funding organizations each year
- OHA participates in X meetings and/or communication within decision making spaces each year
- X grant programs/applications directly reference OHA Principles and Best Practices

- X organizations doing oral history or adjacent work directly reference OHA Principles and Best Practices

**Programming: The OHA develops relevant, value-driven, and innovative programming that enhances practitioners’ ability to do meaningful oral history work.**

<b>Strategies</b>
Experiment with annual meeting formats to increase accessibility and diversity of attendance by expanding partner/stakeholder participation in program content, exploring non-traditional meeting locations, and implementing alternative models for program events.
Develop programming to provide professional development and networking opportunities outside of the annual meeting.
Partner with other organizations to provide programming and networking opportunities that enhance collaboration, community engagement, and oral history knowledge and practice.

*Possible Success Indicators (note that these are very preliminary, and need more work and attention to be finalized)*

- Increase in number and diversity at annual meeting; survey when you register
- In 5 years, we’re offering more trainings, certificates, and an online national network/directory if practitioners
- More sponsored oral history sessions/panels at other conferences; more representation of other organizations at our conference; join grant proposal submitted

**Organizational Excellence: The OHA leadership and executive office build a transparent and inclusive organizational structure that facilitates our mission.**

<b>Strategies</b>
Grow and diversify the membership, paying particular attention to the needs of emerging and under-represented practitioners.
Diversify Council and other leadership roles through thoughtful recruitment and training, transparency around governance, and an inclusive and engaged committee system.

Build Council and committee engagement through effective communication, transparency, and by providing the information and tools necessary for them to excel in their roles.
Ensure that staffing levels and compensation meet the needs of this strategic plan and that staff have the information and tools they need to excel in their roles.
Determine the most sustainable administrative structure to support OHA's work.
Develop organizational structures and procedures that allow us to be responsive to members' needs and concerns in all aspects of the Association's work.

*Possible Success Indicators (note that these are very preliminary, and need more work and attention to be finalized)*

- Membership grows by \_\_\_% per year
- Diversity of membership grows by \_\_\_% per year
- Diversity of leadership grows by \_\_\_% per year
- Committees and task forces are aligned with the strategic plan and function according to the annual work plan
- All Council members are assigned a committee responsibility and participate willingly
- Establish an annual retreat for staff and Council members to assess progress; update plan
- The Nominating/Council Development Committee is actively identifying potential Council candidates year round
- Succession plans are in place for key staff, volunteer, and Council roles

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**Financial Growth and Sustainability: The OHA grows and sustains its financial foundation through prudent management of current income and investments, diversifying sources of income, and fundraising towards endowment growth.**

<b>Strategies</b>
Expand the ways we raise private funds from members and others.
Appoint a development committee to create an annual fundraising plan that supports OHA's fundraising goals.

Cultivate relationships with foundations and federal funding programs for high visibility/high impact programmatic initiatives.

Actively seek collaborative partnerships for funding opportunities.

Regularly evaluate and optimize financial management in alignment with our values.

*Possible Success Indicators (note that these are very preliminary, and need more work and attention to be finalized)*

- Development Committee creates an annual fundraising work plan
- Endowment reaches \$1 million
- Annual contributions grow by \_\_\_% per year.
- Earned income grows by \_\_\_\_\_% per year.
- One major federal or foundation grant is developed, submitted, and received every 2-3 years.
- Planned giving program is created and has participants