

OAH STRATEGIC PLAN 2009-2014

The 2009 OAH Strategic Plan below was adopted by the OAH Executive Board at its 2009 fall meeting, November 21–22, in Washington, D.C.

Introduction

We are in the midst of a tectonic shift in our culture, driven by the cumulative impact of powerful economic, technological, and social forces. As a consequence, the Organization of American Historians (OAH) faces two major challenges. The first is primarily economic, driven by the current world financial crisis and reflected in sharply declining revenues for the organization. The second, simultaneously technological, economic, and demographic, is rooted in changes underway well before the onset of the current economic crisis and will almost certainly continue and accelerate in the years ahead. Warning signs include an increasingly diverse, even fragmented profession; a stable membership that is aging and an unstable membership among younger historians, precollegiate teachers, and students; declining institutional subscriptions for the *Journal of American History* (JAH), coupled with increasing expectations for open access to publications via the World Wide Web; and an underdeveloped Web presence that restricts the organization's authority and reach. Even if the OAH surmounts the difficulties produced by the first of these crises, it faces the long term challenges posed by the latter. Even as it must maintain its commitment to scholarly excellence, the OAH, like all scholarly societies, can no longer operate according to a model that primarily serves members and raises revenue by producing a print journal and holding an annual meeting.

This then is the broad context within which this Strategic Plan has been developed. The plan sets forth an ambitious agenda for the OAH for the next five years, one that aims to address contemporary challenges and move the organization in new directions. In doing so, it builds upon the organization's historic commitment to excellence, its achievements during the past several years, and the successes of the previous strategic plan, adopted by the OAH in 2003. The plan articulates strong support for the organization's core mission and programs, including the JAH and the annual meeting, and for its growing commitment to history teaching at all levels. It also seeks to move the organization to respond more fully to the challenges and opportunities afforded by new technologies; and more actively to advocate for its mission and communicate its accomplishments both to members and the broader intellectual community.

Membership and money are key and interrelated issues for the OAH at this time. Yet membership is not simply a matter of outreach—though that is certainly important—but also of

creating an organization that people know about and with which they want to affiliate over time. Thus, perhaps the most ambitious, challenging, and elusive goal articulated in the plan is that which defines the OAH as a community of all practitioners of American history, an organization that is inclusive in both its membership and programs, a “big tent” in common parlance. Acting on this goal is not only worthy in its own right, but also necessary if the excellence that defines the OAH is to have broad effect and if the organization is to flourish. Membership issues also are intrinsic to other identified goals; Web site development can raise the profile of the organization among potential new members, so can increased efforts at communication and marketing.

Likewise, money is not simply a matter of fundraising—though that remains important—but also of developing new models for doing business, practicing financial discipline, and deploying available resources efficiently. The plan promotes each of these strategies. Furthermore, while implementing any one of the plan’s goals could benefit from greater financial resources, only one—the development of an enhanced Web presence and services to members—requires considerable funds at the outset; and fundraising for that is currently under discussion. Other goals can, with creativity and imagination, be accomplished within the framework of available resources; some can also be income generating.

If the Strategic Plan is a response to a changing economic, technological, and professional environment, it also aligns with many of the values, interests, and concerns of OAH members, specifically as reported in their responses to the membership survey conducted in conjunction with development of the plan. Echoing the “big tent” approach to membership articulated in this plan, members overwhelmingly identified their primary reason for joining the OAH as “to be part of a community of historians” and cited the personal satisfactions, comradeship, and rewards of sharing knowledge about the past as what they value most about being a historian. Equally, they identified the organization’s commitment to historical study and research, especially as manifested by the *Journal of American History*, as what they value most about membership in the OAH; they look to the organization to stay up-to-date on scholarship and access the latest research. The plan firmly supports these interests.

Members also appreciate the OAH’s increasing attention to teaching and to public history and expressed interest in further inclusion of these activities and the historians who practice them. Additionally, members would welcome more frequent communication with the OAH and recognize that expanding services will impose increased costs upon them. Finally, the survey suggests something of a digital divide: while most members are regular, indeed intensive users of Web-based technologies, they use them in rather conventional ways; as a group, fewer have adopted more advanced, interactive technologies—or even, in some cases, the relatively easy

access of the JAH on line—for scholarly, professional, and collegial purposes. Members are also not generally regular users of the OAH Web site, even as they urge development of the organization's Web presence. These last comments suggest that the OAH can fruitfully leverage its reputation for excellence and the trust this has engendered among members by both providing outstanding digital content and encouraging and supporting a fuller engagement with new technologies.

Finally, development of this Strategic Plan comes at critical moment of transition for the organization, as the executive director for the past decade leaves his position and a new director is hired. While many good, often quite specific ideas were generated in the process of developing the plan, it is deliberately general in its definition of goals and strategies. Rather than tether the new director with a series of specific directives, it defines a broad framework for action while leaving ample room for the exercise of creative leadership. Implementing the plan will take intelligence, time, and fortitude; change in an organization the age and size of the OAH is not easy. It is therefore essential that the OAH Executive Board fully endorse the plan, actively support the executive director's efforts to implement it, and engage the membership, especially through the organization's committee structure, in implementation of specific strategies. It is also understood that the plan is a living document; though intended to guide the organization for five years, it will undoubtedly require adjustments and revisions as the organizational context changes, current concerns recede, and new issues emerge.

Methodology

This Strategic Plan has been developed over a lengthy, iterative process, involving the OAH Executive Board, committees, and the general membership, as well as the organization's executive director and staff. The planning process was initiated in 2007, when then OAH President Nell Painter, recognizing the need to develop a new plan to address the changing context of OAH's work, appointed a Strategic Planning Committee, including President-Elect Pete Daniel as chair; and OAH Executive Board members Elaine Tyler May, Linda Shopes, and David S. Trask. Subsequently, Steven D. Andrews of the JAH staff, Jay Goodgold, Leadership Advisory Committee Cochair, and Alice Kessler-Harris, past OAH Executive Board member and subsequently President-Elect, joined the committee; Shopes was appointed cochair. Ex Officio members included Lee Formwalt, Executive Director (through July 2009); Katha Kissman, Interim Executive Director (from August 2009), Edward T. Linenthal, JAH Editor, and Robert Griffith, Treasurer.

Preliminary discussions took place within the committee throughout late 2007 and early 2008; with the OAH Executive Board at its meetings in Fall 2007 and Spring 2008; and with OAH committees at the 2008 annual meeting. On July 16 and 17, 2008, the Strategic Planning Committee met with OAH and JAH staff at the organization's Bloomington offices; it reviewed data and documents pertinent to finances, membership, staff functions, and key OAH programs; considered a SWOT analysis of the organization; and assessed current programs in light of mission and the then current strategic plan. From this meeting, the committee identified eight major areas of concern: membership, activities and programs, finances, development and marketing, new media, public history, internal organization, and advocacy. These were discussed at length with the full OAH Executive Board at its October 25, 2008 meeting and further refined as a series of broad goals at a committee meeting the following day. During its July and October 2008 meetings, the committee also developed a survey instrument designed to elicit members' views on several key issues. The survey was conducted online during the fall of 2008 and winter of 2009. Some 13 percent of members responded; results were compiled and reviewed by committee members and summarized in an August 2009 article in the OAH Newsletter.

Following its October 2008 meeting, committee members drafted elements of a plan and met via conference call on February 26, 2009 to consider them further. A draft plan was presented at the 2009 OAH Annual Meeting in Seattle to both the OAH Executive Board and during an open forum. Members were also apprised of the development of the plan in several OAH Newsletter articles; in August 2009 the draft plan was posted on the OAH Web site and further comments invited. Based on comments received from the members during the open comment period which ended October 1, 2009, and through its conference calls, the committee further refined the plan and presented its final document to the OAH Executive Board for approval at its fall 2009 meeting, November 20 and 21, 2009 in Washington, DC.

Goal and Objectives

The first and most important goal for the organization is to sustain and strengthen its support for the production and dissemination of historical scholarship of the highest order in all fields of American history. To accomplish this, the OAH will:

Continue and further develop the Journal of American History and the annual meeting as core activities of the organization, creatively responding both to the interests of a diverse profession and to the opportunities afforded by new technologies.

Continue and further develop the OAH Magazine of History, the Distinguished Lectureship Program, and the National Park Service program as means of disseminating scholarship beyond the academy.

Continue to reward outstanding scholarship via the organization's awards and prize program [link], using notification of awards and award winners to promote the organization's commitment to excellence.

Identify and develop new means of supporting, recognizing and disseminating outstanding scholarship produced by historians in all areas, including public historians, independent scholars, and contingent, part-time and adjunct faculty, through research, teaching, and public presentation.

Continue and expand upon efforts to create a larger and more inclusive OAH, attracting a membership that reflects the broad community of American historians. To accomplish this, the OAH will:

Develop a more inclusive definition of historical practice that will fully integrate historians whose work entails a variety of activities, products, and audiences.

Assess and modify the OAH Profile and Mission Statement to reflect interest in the work of historians as they address a full range of scholarly, professional, and public offices.

Assess and modify OAH programs and activities to be more inclusive of all historians.

Develop means of attracting and retaining the cohort of younger scholars, i.e. those who received their graduate degree within the past five years.

Create opportunities for historians with varied forms of practice to understand and engage with each other's work.

Expand the scope of the annual meetings to include sessions that address relations among members of the profession as represented by the OAH and the general public, and issues that cross the boundaries of public concern and professional interest.

Use the annual meeting to reach out to and educate undergraduate and precollegiate students in the region about graduate education and the history profession.

Strengthen existing and develop new partnerships with history and history-related agencies, organizations, and institutions.