

## OAH STRATEGIC PLAN 2015-2018

*Approved by the OAH Executive Board, April 16, 2015*

In 2009, the OAH adopted a sound and well thought-out strategic plan recognizing the many changes under way in the organization and society. The organization faced several major issues including a major recession, declining revenues for the association, a diverse and fragmented profession, an aging membership, massive changes in technology, an underdeveloped and underutilized Web site for the OAH, and the increasing movement toward open access for journal publications. We are no longer in a recession and finances have improved for the association, but we still face issues with technology and open access, a fragmented profession, and an aging membership. While we have improved our Web site, we need to continuously keep up with the ever-evolving technology, not always an easy matter for a small staff with a limited budget. For the past several years, we have balanced the budget and cut costs, but we still receive limited revenue streams. Moreover, the context for the teaching of American history, both at the high school and the college level, is unsettled, as more and more emphasis is placed on the STEM (Science, Technology, Engineering, and Mathematics) subjects and fewer resources and time are allocated to the humanities. As a membership organization, the OAH needs to become better known, provide real value for members, and operate as an organization that can act quickly, but prudently, in a rapidly changing environment.

Designating several days for a strategic planning retreat was often the way that nonprofit organizations and associations developed their long-term goals. This custom has lost force and currency today: change is so rapid that the plan can be outmoded by the time the association's leaders develop it. Although creating a five-year plan was the norm several years ago, leaders are now creating three-year plans that are revised and reviewed annually. To quote Jeff DeCagna, a well-known association management consultant, "Strategy today and in the future must be a continuous, real-time process of learning rather than a calendar-driven exercise in planning that occurs in 'association time.'" DeCagna also notes that today boards have a "duty of foresight" in addition to the duties of care and loyalty. As he writes, "The duty of foresight is the responsibility to orient the work of the governing board toward a deeper reflection on the plausible future consequences of strategic action (and inaction) in a complex and uncertain environment."

Every day, the staff of the OAH deals with members from every category of membership and every level in the historical profession. The staff knows the resources of the organization; they have a good sense of what it would take to meet various goals positioning them to appraise which goals are feasible from both a financial and time perspective. The board, which is elected by the members, and committees also understand the needs of the profession and the historian members. Therefore, this plan emanates from the staff, comments from members, and comments

from the November 2013 Executive Committee meeting and board and committee member comments. Some of the goals declared in 2009 reappear here because they are timeless and play a persistent role in helping the OAH fulfill its mission. Others from the 2009 document are restated here, but are now tied to new objectives. This plan must be strategic enough to give direction to the OAH, but with sufficient flexibility to permit the organization to react quickly to change. It proposes perspectives and plans that can move the organization to a stronger future, even though—or perhaps because—they will require tough decisions. Rather than a separate, free-standing goal, the aspiration to “meet the challenge of information technology” is now incorporated into every goal of the organization, because the new technology permeates every aspect of the organization’s operation.

***Goal 1: Increase and expand the OAH membership by reaching out to diverse groups. Qualities of diversity include age, generational cohorts, racial, ethnic, gender and sexual orientation, as well as the various specialties of American history and the occupational categories of tenure-track professors at universities and four-year colleges, community college professors, K-12 teachers, part-time and adjunct professors, public historians, archivists, historians working in the federal government, museum curators, as well as those whose avocation is history.***

Specific objectives:

- a. Develop a value statement (not just the value of membership benefits) as a persuasive rationale for joining and feeling an affiliation with a professional association. In particular, this statement should make the case for the compatibility of belonging to a group brought together by an interest in a particular historical field, as well as the broader group of OAH.
- b. Make overtures to recruit historians who are well-known to the general public to become members of the association. Such figures have enhanced the public’s appreciation and interest in history, making it simple wisdom to welcome them into the community of the OAH.
- c. Encourage a culture in the OAH office that promotes member service.
- d. Develop independent marketing campaigns for the groups identified in the description of Goal 2, and stress benefits that would appeal to their particular enthusiasms and concerns.
- e. Expand services, programs and publications that meet the needs of the various groups. In short, give members value for their money.
- f. On a yearly basis, survey various groups and membership segments to determine if the OAH is providing value to them as members, and to solicit their suggestions for enhancing that value.
- g. Monitor the usage of various benefits/services provided to members.

- h. Continue to provide services that attract young people; continue to provide services that retain long-time members. For example, providing mentoring for younger members also provides an opportunity for long-term members to engage with the OAH by being mentors.
- i. Continue to provide and improve career services for all members including those seeking their first jobs, as well as those members seeking career advancement. Enhance the OAH Career COACH® Website by the addition of video interviews, podcasts, etc. Consider publishing a “salary survey” and state of the profession report that looks at salaries for historians in both the traditional academic market, as well as in the various public history professions.
- j. Allow committees and other specialty associations to have more defined benefits and be listed on our Web site (similar to AHA’s affiliate groups). They might enjoy a discount on our membership, the ability to exhibit for a small fee at our Annual Meeting, the establishment of a blog or listserv for communication. These groups could also be set up through LinkedIN and Facebook.
- k. Continue to “unleash the power” of OAH’s online database by collecting more data on members (including their specialty areas and research interests) and utilizing it as a way to connect the community of historians and engage them in a conversation that is meaningful to their special interests.
- l. Modify the mission statement of OAH to indicate interest in the broader definition of American historian (this was in the previous plan but never done).
- m. Refine the data in the new OAH database so potential markets can be segmented to fully mine the data in the OAH database to develop member prospect lists so we can market membership in a targeted way to these groups.

***Goal 2: Continue to sustain and strengthen the organization’s support for the production and dissemination of historical scholarship in all fields of American history.***

Objectives:

- a. With Oxford University, continue to develop the *Journal of American History* as the leading academic journal in the field and to increase the journal’s overall impact rate.
- b. Conduct a search for a new editor of the *Journal* in FY 2015-16.
- c. Continue to recruit and retain highly qualified staff in both the *Journal* and National offices.
- d. Continue to explore new digital delivery formats for articles within the *Journal* and for interactive blogs and other communication tools that open and activate channels for member engagement and interaction.
- e. Continue to improve the annual meeting; ensure the inclusion and representation of the many different historical areas of study and categories of historical employment; expand

the exhibit area to include new tools and knowledge available to the profession; and include museum exhibits to enhance traffic to the exhibit area.

- f. Explore the possibility of archiving annual meeting paper abstracts as a potential research tool for students and scholars. The annual meeting paper abstracts demonstrate the research in progress in American history.
- g. Continue to reward outstanding scholarship via the organization's prizes and awards and publicize the recipients of those awards.
- h. Actively promote Recent Scholarship Online, and the database of over 65,000 bibliographic entries that the OAH actively maintains, as an important research tool.
- i. Explore options for content curation (i.e., the collection and organization of information relevant to various subjects within the field of American history) of scholarly materials. Many individuals are overwhelmed with the amount of information or research on a particular subject. Thus, OAH may want to periodically publish a list of materials available on the latest and best resources in a particular American history specialty or hold a special conference or every other year focus on the state of the various areas of American history.
- j. Utilize articles and scholarship produced by the OAH and its members for Advanced Placement, high school, and community college instructors to increase the level of scholarship at these institutions.

***Goal 3: Continue to operate a sustainable, efficient, and nimble organization that is responsive to members and can react quickly to the needs of members and the rapidly changing world in which they operate.***

**Objectives:**

- a. While the organization has seen small surpluses each year, and its Executive Director and her staff take more care in negotiating contracts and in curbing expenses, the OAH must continue to pursue and cultivate more revenue streams and build its endowment through unrestricted large gifts, planned gifts and investment management.
- b. Create a value statement for the OAH that promotes member service, encourages growth and development of staff, and encourages innovation so the organization attracts and retains good staff.
- c. Set a goal for the endowment (reserve) fund and then build the endowment through large unrestricted gifts and investment management.
- d. Continue to conduct an annual fund campaign, but concentrate efforts on planned giving and obtaining grants for projects. However, the grants that are obtained should be for projects that can be self-sustaining and that adequately estimate the costs and amount of staff time needed.
- e. Examine the relationship of the national office with Indiana University and determine specific ways that relationship can be enhanced.

- f. Provide training for the Executive Board and the Nominating Board.
- g. Plan for future leadership of the association (in recognition of the important role of the executive director) by developing a succession plan.
- h. Expand and enhance current non-dues revenue programs (like the National Park Service), Distinguished Lectureship Program and OAH Career Center, and develop similarly effective new programs.
- i. Ensure that the Annual Meeting pays for itself and staff and provides income for the OAH.
- j. Continually review various programs and projects; develop metrics for determining a project's success, and acknowledge the necessity of eliminating projects that no longer meet the mission and goals of the organization or are not economically feasible or sustainable.
- k. Continuously update the Website and ensure that the data in the database is current and that the database operates efficiently and effectively for the organization.

***Goal 4: Make sure that the OAH's commitment to outstanding instruction in American history leads to concrete and consequential actions.***

- a. Continually survey members to ensure that the new OAH magazine, *The American Historian*, meets the needs of those who practice and teach American history. Surveys should determine if members find value in the new publication and if the magazine is a tool for attracting and retaining members.
- b. Develop teaching units for AP instructors and other history teachers using materials from the *JAH* and old *MOH*.
- c. Continue to provide teaching workshops and seminars at the OAH annual meeting; popularize a format for sessions featuring research papers that includes a teacher who can address how the scholarly information presented in the session can be used in the classroom.
- d. Develop regional workshops that allow individuals who teach but cannot afford or attend the OAH annual meeting to keep up-to-date in their fields.
- e. Continue to provide a high quality Annual Meeting and provide state of the field sessions at the meetings.
- f. Continue to advocate with the U.S. Department of Education to restore teaching grants for American history.
- g. Fully utilize the OAH website as a means to disseminate teaching materials.

***Goal 5: Keep the OAH and American history in the public's eye by developing and maintaining a robust public relations campaign and supporting history advocacy efforts.***

- a. Continue to maintain a good relationship with all major history organizations.
- b. Continue to inform members of the OAH's work and its benefits through the online newsletter, website, and printed newsletter.
- c. Develop an overall public relations plan and individual publication plan for OAH's various programs and publications.
- d. Develop a list of media outlets and send regular releases regarding the OAH, its work and its members' work.
- e. Develop a press kit for the OAH.
- f. Develop an expert list of people willing to talk to the press regarding various issues or subjects in American history and a training program on how to deal with the press.
- g. Develop a public relations crisis plan which would include how to respond to the press in case of adverse publicity for the OAH.
- h. Work regularly with the National Coalition of History to advocate for the profession and publicize these efforts.
- i. Develop a photo archive so OAH staff can have easy access to photos for press releases.
- j. Ensure that the OAH logo, mission statement, and overall messages are consistent in all publications, press releases and reports.