Strategic Plan

2019 – 2023
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“Even though we are a historical society, our focus is on the future rather than the past.”

Kerry Tymchuk, OHS Executive Director

Introduction: Being OHS

Outstanding programmatic success. Diverse partnerships. Unprecedented financial growth. Generous donors and volunteers. Record attendance and expanded digital access. New and continuing members. 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 OHS 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 further leverage the power of technology to 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 in 1898, 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 artifacts, photographs, maps, textiles, artworks, 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.

“You preserve records that would otherwise perish, and you lay the foundations upon which the mighty historic master of the future must build.”

Theodore Roosevelt, written in 1900 in a letter to George Himes, the Oregon Historical Society’s first curator

Sue Seyl, longtime Curator of Photographs for the Oregon Historical Society Research Library, circa 1986
What We Do

We share our vast collection through thought-provoking exhibits, digital collections, and digital history projects. Our scholarship, public lectures, and community events support lifelong learning—often challenging conventional thinking about power, commerce, class, democracy, art, and science.

We advance critical inquiry through the Oregon Historical Quarterly, a journal that has sparked conversations and knowledge creation for more than a century. Our research library is a destination for international scholars, as well as Oregonians who are curious about their own ancestry or community history.

With tours and traveling trunks, we bring history directly to Oregon students, bridging gaps of time and perspective. Through our History Hub, Family Days, and events such as the Lunar New Year Parade, we continually work to create a welcoming, engaging, and fun environment for people of all ages and backgrounds.
Accomplishments & 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 \textit{FORWARD!} capital campaign, launched in 2016, has inspired unprecedented financial gifts that are enabling us to create a new, permanent Oregon history exhibit, \textit{Experience Oregon}; to renovate the world-class Research Library; and to expand the innovative Digital Vault, which brings OHS collections to researchers across the globe.

\textit{“In knowledge and history lay our greatest weapons, our greatest true power.”}

\textit{Senator Mark O. Hatfield}
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 to develop *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 and managing growth has continued to rise. Much of the 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 trustees, staff, 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 of Trustees, Senior Team, and a cross-section of staff and Cabinet members came together for a series of interactive sessions to explore OHS’s vision, values, strengths, challenges, and strategies. The Design Team then fleshed out a five-year strategic framework and associated near-term implementation milestones. After integrating input from the staff, trustees, and Cabinet, the final plan was approved by the Board.

“History gives context and informs us of why we are here now. False history does not provide proper context. We have mostly been given false history. This is turning around a bit now.... I am happy to see that OHS is continuing to evolve with a deep commitment to being community-oriented.”

Gwen Carr, Oregon Black Pioneers
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.

Members of Air Corps, (left to right) Millard Chung, Constance Moy, Di Lam, OHS Research Library, bb009687
Our Values

OHS aspires to consistently enact the following values:

**INTEGRITY**
OHS is committed to honest communication, transparency, and managing resources in a trustworthy and accountable manner. We foster evidence-based practices in our research, scholarship, exhibits, education programs, and publications.

**INVITATION**
OHS is a community gathering space, resource, and catalyst for civic engagement that is rooted in understanding Oregon’s history. We foster meaningful relationships with many individuals and partners who inform and direct our work.

**EQUITY AND INCLUSION**
OHS seeks to address 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.

“Oregon’s history started with exclusion. Not everyone was or is allowed to be at the table. People are yearning for a place to try to understand how we got here. How will we make the new immigrant populations understand Oregon’s history in a way that they will feel and identify as being part of this history? OHS is already beginning to do this.”

Judith Margles, Oregon Jewish Museum and Center for Holocaust Education and American Alliance of Museums
CULTURAL HUMILITY
OHS believes that history cannot be contained within a single story or point of view. We respect the validity of different perspectives and are committed to exploring and embracing 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.

LEARNING
OHS values questions, new ideas, and unexpected connections and discoveries that arise through inquiry. We welcome challenging conversations and the opportunity to learn from mistakes. We recognize that willingness to change our minds is crucial to understanding history and applying it to the present.

“It is through our history, arts, and culture that we understand our world…. OHS is a connector, linking the past to the present and facilitating dialogue on how this impacts our future as citizens of Oregon.” Gloria Lee, The Giving Tree and Chinese American Citizens Alliance
Strategic Environment

Several influential trends and developments are shaping the OHS operating environment: ubiquitous technology is re-shaping how we live, learn, 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 challenging due to changes in 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 accessibly 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

“History — knowing who you are and where you’re from — is medicine. Your relationships and community benefit when you can place things in context and have a way to organize the world around you. With any group of people, no matter what the social ill is, it comes from a lack of understanding, a lack of context…. If you can stimulate dialogue, conversation, and understanding, it makes the world a better place.”

David Harrelson, The Confederated Tribes of Grand Ronde
Strategic Direction & Goals

To move towards our vision while addressing key challenges, OHS will pursue four broad strategic directions and associated goals over the next five years:

**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

**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
PROACTIVELY EMBRACE TECHNOLOGY

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

OPERATE WITH EXCELLENCE AND CREATIVITY

• Foster a culture of collaboration, learning, and evaluation
• Continue our commitment to programmatic excellence and innovation
• Update our organizational structure and practices to align with strategic priorities
• Optimize our physical space

“We can’t even imagine how we will learn history in 20 years…. If someone had told me 20 years ago that a Puerto Rican writer would create an opera about a long past U.S. president, that he would use hip-hop to convey the drama and make the Revolutionary War into an American immigrant story, that it would go viral, and that my young nieces would memorize the entire libretto, I would not have believed it!” Jacob Nadal, Library of Congress
Planning Cycle

OHS’s planning cycle will promote continual action, reflection, and accountability as we implement the strategic plan. To ensure a “living plan” and alignment across our institution, we anticipate regular review sessions and an annual retreat to celebrate accomplishments, monitor progress, and make plan updates.

Adopt Strategic Plan and Actionable 18-Month Milestones

Every 2 to 3 Years: Bigger Look at Trends, Vision, Broad Strategy

Develop and Implement Workplans Based on Milestones

Annually: Celebrate Accomplishments, Update Milestones

Twice a Year: Review Progress and Lessons Learned
## Implementation Plan  
**January 2019 – June 2020**

### Strategic Direction and Goals (5-Year Horizon)

<table>
<thead>
<tr>
<th>Enhance Belonging</th>
<th>Grow Our Reach and Resources</th>
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</thead>
<tbody>
<tr>
<td>Continue to collaborate with communities statewide to bring increased diversity to the history we gather and present</td>
<td>Build on the momentum of the <em>FORWARD!</em> initiatives: <em>Experience Oregon</em>, Digital Vault, Renovated Library</td>
</tr>
<tr>
<td>Develop and implement institution-wide Diversity-Equity-Accessibility-Inclusion (DEAI) program</td>
<td>Maintain and grow our funding, including private and public support</td>
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<td>Get to know our visitors and enhance the visitor experience</td>
<td>Become a visible and valued resource for all of Oregon</td>
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### Actionable Milestones (Within 18-Months)

<table>
<thead>
<tr>
<th>Enhance Belonging</th>
<th>Grow Our Reach and Resources</th>
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<tbody>
<tr>
<td>Current partnerships and audiences mapped as a “baseline” to inform outreach priorities; field services considered</td>
<td>Statewide awareness campaign developed for <em>Experience Oregon</em>, Digital Vault and Renovated Library</td>
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<tr>
<td>Affiliate communication vehicles strengthened</td>
<td>Strategy developed to retain <em>FORWARD!</em> supporters; new member campaign</td>
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<tr>
<td>Board-Staff-Cabinet DEAI Work Group launched; institution-wide engagement strategy and metrics developed; training underway</td>
<td>OHS financial reserve analysis, through the lens of economic resiliency</td>
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<td>First annual Visitors Count! survey implemented in cooperation with AASLH</td>
<td>Groundwork for Multnomah County Levy renewal established</td>
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<td>Brand orientation to familiarize staff and board with OHS brand guidelines</td>
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## Implementation Plan  
**January 2019 – June 2020**

### Proactively Embrace Technology

<table>
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<tr>
<th>Strategic Direction and Goals (5-Year Horizon)</th>
<th>Actionable Milestones (Within 18-Months)</th>
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<tbody>
<tr>
<td>Develop and execute an institution-wide technology planning to increase reach/diversity, amplify impact, improve efficiency</td>
<td>Three-Year Digital/IT Roadmap developed</td>
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<tr>
<td>Support operations, programs, exhibitions, education, and collections</td>
<td>Enhanced capacity to digitize and create access to maps and plans, oral histories, and film</td>
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<tr>
<td>Maintain and update technology systems</td>
<td>Network assessment to inform technology updates and upgrades</td>
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<td>Short-term staff training priorities identified; implementation underway</td>
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### Operate with Excellence and Creativity

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<th>Strategic Direction and Goals (5-Year Horizon)</th>
<th>Actionable Milestones (Within 18-Months)</th>
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<tr>
<td>Foster a culture of collaboration, learning, and evaluation</td>
<td>Strategic plan review sessions to track progress (based on the strategic framework); begin 12/19 or 1/20</td>
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<tr>
<td>Continue our commitment to programmatic excellence and innovation</td>
<td>Evaluation plan developed with institution-wide success measures</td>
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<tr>
<td>Update organizational structure and practices to align with strategic priorities</td>
<td>Internal decision-making protocols reviewed and updated</td>
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<td>Programmatic innovations highlighted annually with trustees and key stakeholders</td>
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<tr>
<td>Optimize our physical space</td>
<td>Staffing plan reviewed based on strategic priorities; workloads assessed; some projects eliminated to enable staff capacity for strategic priorities</td>
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<td>Board self-assessment and committee structure update to align with strategic priorities</td>
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<td>Renovated library integrates digital and analog resources in a more accessible and flexible space</td>
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<td>Building space utilization and infrastructure needs identified</td>
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Acknowledgments

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.

Trustees
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Acknowledgments

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Gwen Carr, Board Secretary, Oregon Black Pioneers
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Paula Manley  •  Sarah Newhall  •  Doug Pahl  •  James Parker  •  Leslie Spencer  •  Ivy Timpe