Strategic Plan 2019-2021

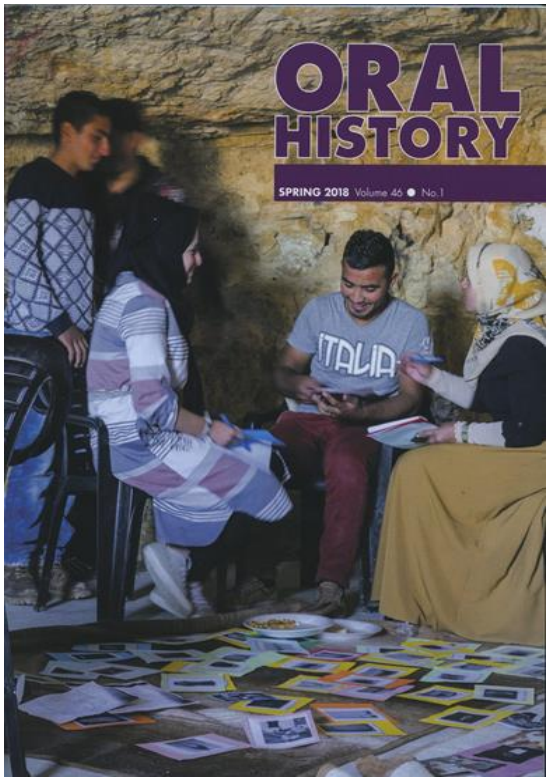
Oral History

Oral history offers a rare chance to talk about and record history face to face and capture the life stories and experiences of people who are hidden from the historical record. Their voices, individual and collective, enrich as well as challenge views of the past with new insights and perspectives. For example, the collective memories

of those with shared experiences of migration, work, sexuality or specific health conditions are important in terms of giving such groups due recognition and for raising public awareness. They also help to shape public policy and practice. In more private settings, oral history offers a way of recording the lives of our family members and complements the wider public histories of our recent past.

The Oral History Society

The journal, *Oral Histo*ry, was launched in December 1969 and the Oral History Society (OHS) began in 1973 establishing a community of expertise and interest in collecting, preserving and using oral histories, becoming the leading forum for debate and advice in the field. *Oral History* is the oldest and only independent journal of oral history, publishing articles and news from oral historians in the UK and around the world as well as publicising projects, events, for example the OHS annual conferences and appointments in the field. The OHS, in conjunction with National Life Stories at the British Library, runs training courses for those interested in conducting oral history interviews, archiving and digital editing, as well as offering specialist courses on turning oral histories into stage or radio plays. The training team taught 94 courses to 846 attendees in 2017, a record for the group. The Society also runs courses tailored to the requirements of a particular project or group of participants and a range of Continuing Professional Development (CPD) events. The OHS has a number of Special Interest Groups and a thriving Regional Network.



Challenges

Over the last decade the contraction of public services has seen a decline in job opportunities in archives, museums and libraries with the result that many wishing to pursue their interest and expertise in oral history outside universities have been forced into freelance self-employment. As a result, a number of our members work on a voluntary basis for the OHS, whilst seeking paid, contractual employment beyond the organisation in order to develop their careers in oral history. The Heritage Lottery Fund has continued to be a major funder of community-based oral history and this has provided employment (and volunteer opportunities) on a short-term basis. However, funding for oral history projects is likely to be more competitive and difficult to obtain over the next few years. This is a particular challenge for the OHS which has traditionally championed and supported community-based oral history work.

Universities have not escaped cuts in real income and with the shift to student loans as the principal source of funding many courses in the arts and humanities have been considered
expendable and have closed. These include a number of dedicated courses in oral history. Against this backdrop, members have continued to promote and teach university courses on oral history, sometimes within heritage and archive studies, and media and communications, as well as supervising postgraduate students doing oral history based research. The OHS has a well-established Higher Education Group, a number of whose members sit on the editorial board of *Oral History*. The Higher Education Group runs a seminar series in conjunction with the Institute of Historical Research and a Spring School in London aimed at postgraduate students. It has successfully lobbied for oral history to take its place as a recognised discipline within the academy as witnessed in the recent appointment of an oral historian to a panel assessing the quality of research in UK higher education. Finally, our successful efforts to expand the network of educators/oral historians/curators and develop our website resources for schools, should be understood in the context of educational policies and funding cuts that, if anything, have hindered such developments. Under such unfavourable conditions it is not surprising that the OHS has witnessed a steady decline in membership over the last five years from 994 in 2013 to 831 in 2017.

One of the most dynamic areas in recent times has been in the area of communications technologies, some of which have been of particular significance to oral history, for example recording equipment, editing software and data storage. The growth of social media and other internet-based sources of information are providing important alternative accounts and interpretations of historical events. These developments also present a challenge for all organisations, including the OHS and partner academic/practitioner organisations as those opportunities associated with the growth of social media and other internet sources of information increase the expectations of immediate access to advice, resources and often require very speedy responses.

The OHS is committed to widening participation in oral history, both nationally and internationally, to groups and interests whose voices are invariably heard, if at all, on the margins of mainstream public debate. Since our last strategic review in 2013 we have established and supported a dynamic Regional Network and a number of Special Interest Groups (SIGs), namely: Environment and Climate Change; Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ); Migration, and Psycho-Social Therapies, and Care Environments. However, our efforts to widen participation, both in terms of people and practices within the organisation, remains work in progress.

The Strategic Planning Process

The planning process has provided an opportunity to reflect on and review our achievements and shortcomings, to take soundings from our members on their views of the organisation and to use both to think about priorities for the next three years, from January 2019-December 2021. We are particularly grateful to those members who took the time to respond to our survey and make some extremely helpful observations and suggestions, a number of which will hopefully be apparent in our plans.

A review of our recent annual accounts suggests that, whilst the OHS has a healthy bank balance, in our most recent accounts (2017) expenditure for the year exceeded income generated, a position which is also forecast for the 2018 financial year. We have therefore taken the opportunity provided by this review, to firstly reduce costs where we can and secondly, and this is our preference, to identify new income streams.

An important feature of planning is to consider the link between resources and activities: how much do we spend in relationship to our income? How much do our different activities cost? Could we spend our income more wisely? Could we find more income and/ or voluntary support to pay for more of what we want to do? Whilst we cannot underestimate the invaluable contribution that members make in a voluntary capacity to the OHS at all levels of the organisation, we also have to recognise that some jobs have to be paid for and that a number of activities won't happen without investment.

Our Plans

The broad themes below reflect the responses of members to our survey conducted in early 2018 and from a weekend to consider our plans over the next three years attended by Trustees and two members of our Regional Network. We had established four sub groups at our December Trustee meeting, each one responsible for writing a report and leading a session over the weekend. The groups were: Priorities and Mission; Expanding and Engaging our Membership; Promoting the Objectives of the Organisation, and Governance. A great many ideas and suggestions emerged from the survey, reports and our deliberations and can be grouped around the following: Improve Benefits for Members; Improving Communications; Widening Participation, and Financial Sustainability. Under each heading there are a number of specific proposals which we will consider in terms of practicalities, including costs, before implementing.

Some of the OHS Trustees at the Strategic Planning Weekend, London Metropolitan University, March 2018.

1. Improve benefits for members

Our membership gives us a sense of a collective identity and a movement, which in turn gives us leverage in terms of influence and lobbying, and a gravitas that comes with numerical strength. Our membership also provides the means for ensuring best practice,
maintaining standards and a platform to gain recognition for our work.

As Trustees, we have to turn this question around and ask ourselves how far do our members need the OHS? What does the organisation do for its members? Is there more that can be done? Do we make these benefits clear in our communications? In order to add to existing benefits for members, we propose to:

- Widen the training programme geographically and offer more specialist topics.
- Explore the viability of developing a mentoring and careers advice service.
- Consider the development of a directory of members detailing interests thus stimulating new networks of members with shared interests.
- Explore the feasibility of running webinars for conferences, seminars and training courses for members who otherwise may not be able to attend such events.
- Review current membership fees and consider the establishment of tiered rates linked to accessing specific benefits and generating different income outcomes.

Dr Michelle Winslow, Oral History Accredited Trainer, providing Oral History training at Ashgate Hospicecare, Chesterfield, May 2018.

2. Improving Communications

Our aim is to enhance our communications in order to make us an open, transparent organisation, one that increases opportunities for everyone to participate across the OHS within the requirements of the 2018 General Data Protection Regulation (GDPR). This will mean developing a communications strategy in order to ensure

that resources are dedicated to our website and to explore new ways of actively engaging with members. The following are aimed at both improving the quality of information and at creating more interactive environments where views can be sought and opinions exchanged. We therefore propose to:

- Develop a communications strategy for the OHS and expand the membership of our Website Group.
- Launch a drive to build our database of members' email contact details to enable us to communicate more efficiently and effectively.
- Improve our existing e-newsletter to include a digest of activities of members as well as accounts of the deliberations and decisions of the OHS Board and its Committees and Groups.
- Increase our use of social media, including twitter and facebook, in order to promote the OHS and highlight news of our campaigns, events and achievements.
- Working in conjunction with Webscribe, create a more dynamic, interactive website including audio with the purpose of promoting oral history and the core values of the OHS, explaining the role of Trustees and Regional Networkers and explaining the benefits of OHS membership.
- Improve online membership and conference/events registration.

3. *Widening Participation*

'Widening participation' is a phrase which means groups and individuals playing diverse roles in the OHS. The aim here is to attract individuals and groups, hitherto on the fringes or outside the organisation, to play a more active and influential role in the OHS. It also means finding new ways for the Board and its Officers to respond to the needs and views of the wider membership and from the oral history community at large. In seeking to address both these challenges, we propose to:

- Increase our involvement in the international arena.
- Conduct a 360◦ review of our Special Interest Groups and evaluate how SIGs fit into OHS structures in order to best harness the energies and enthusiasm of their members.
- Ensure the participation of Trustees and Subgroup members in regional network meetings, when held in their locality.
- Promote and participate in awareness days/months, e.g. Black History, Health Awareness, Local and Community History, International Women's Day.
- Enhance the organisation's campaigning role where relevant to our wider aims and objectives, for example to enhance the campaign to promote oral history in schools and with youth groups.

Improving communications along the lines outlined above will be integral to our plans to widen participation. Consideration will also be given to the creation of a Council of Advisors, convening a number of open Trustee meetings, a review of trustee roles and tenures of office, and assigning more formal roles to regional networkers on OHS tasks/projects.

4. *Financial sustainability*

Our ambitions for the OHS are greater than our levels of income, which means that we need to keep a close eye on costs but more importantly we must develop new funding streams as well as increase revenue from our current activities. With the aim of increasing income, we propose to:

- Investigate the logistics of a number of sponsored OHS awards/events, e.g. for schools, project of the year, new author's prize for best article/book.
- Consider the setting up of an OHS personal life history service.
- Consider a more formal offer of project advice and support (in some cases on a costed basis).
- Attach a levy payable to the OHS for individuals booking on our stand-alone training courses which we run in partnership with National Life Stories at the British Library.
- Fund raising activities around 50th Anniversary of the Journal in 2019 (joint Journal/OHS celebration).
- Pursue grant applications (e.g. HLF Resilience grant) and trust funds.
- Review library access to Journal via JStor to maximise our revenue stream.

Some of the proposals in the 'benefits to members' section above might be charged i.e. on-going support for oral history projects; mentoring; careers advice, and webinars. These could be linked to revised membership rates. We are hoping that our plans will encourage new members to join the organisation as members' subscriptions remains our largest source of income. Working in collaboration with those in paid positions, we also expect to advertise some volunteer positions to support the activities referred to in this report, e.g. conference/events assistant, website/communications. In doing so we may identify the need for additional paid support but further investment will be conditional on new income.

Next Steps

We have developed some interim measures for the remainder of 2018 in order to put us in a stronger position for the start of the planning cycle which will begin in 2019. Each year thereafter we will identify a specific set of actions corresponding to the proposals in this plan. We will assign responsibility for implementation to an individual or subgroup, identify any resources required to bring them to fruition and report annually to the membership via our newsletter and at the AGM.

June 2018

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