OHS Strategic Plan 2023

Over the past few years, the Oral History Society has been faced with both new opportunities and new challenges. Our previous Strategic Plan created in 2018 was based on extensive member consultation around governance, mission, promoting objectives and membership. It was decided that the focus for the coming years would be on the following aims:

- Improving benefits for members
- Improving communications
- Widening participation
- Financial sustainability

We have achieved a tremendous amount in delivering these aims. Following the recommendations of the Governance Working Group and the Digital Strategy Group, we have improved and widened digital communications and made changes to the way we govern the society.

The aim not fully addressed, however, is how we sustain and resource our ambitions as a society. This has become more critical as we add to our activities and services, costs increase, membership decreases and our capacity as volunteers is being squeezed.

Informed by an online membership survey, the 2023 round of Strategic Planning sought to address the issue that underpins everything we do – resources, both financial and human. How do we progress sustainably as a society? What do people need from us and how do we use that to encourage people to become members? How do we increase resources for our activities and keep costs down?

As a result of our discussions, the Society's aims for the next four years are as follows:

- Achieving financial sustainability by increasing membership and income
- Being operationally sustainable, by rethinking how we operate and resource our services.

AIM: Reduce barriers to membership and increase membership incentives

OBJECTIVE	ACTION POINTS	RESPONSIBILITY	COMMENTS
OBJECTIVE 1: A frictionless joining process for members	Prepare **a clear brief of our needs**, what we want to prospective members to experience, the data we need to have access to and how we want to control it.	Members of DSG	This is needed as a checklist in order to weigh up the pros and cons of various options.
	Research Webscribe/Mini Orange option with Webscribe and their developers	Members of DSG	Webscribe are not ready yet as they are still trialling with another customer. What would their timescale be? We would probably need to involve Evoluted in the setting up.
	Research options for managing membership ourselves, via a Wordpress plugin.	Members of DSG	Need to fully research available plugins, cost, functionality against checklist. Questions: • would membership plugins be compatible with groups.io or would you still need something like mini Orange /developers? • What human resources would be needed to manage it in-house? • Would Webscribe still manage journal distribution? • How would having a digital journal affect things? • What hosting and Wordpress support would we need? Would Evoluted be able to deliver?
N.B. It may well take the best part of a year to come to a decision on the above, yet alone implement it. Progress on some other objectives may be dependent on getting this building block in place first.			
OBJECTIVE 2: Create Purposeful Membership Tiers	Create **working group** to look at **group membership** and **library subscriptions**. Consider what group membership would look like and where to pitch membership and subscription fees.	Working group tbc	The working group needs to overlap/collaborate with the group looking at the joining process in order to establish what is practically possible. It may be worth getting some business advice.

			N.B. New membership management system would have to be in place before implementation.
OBJECTIVE 3: Further develop ideas for membership benefits that would attract particular user groups	**Consider student subscription package**	Working group - tbc	Build on suggestions made by those looking at HE in Strategic Planning event. Working party to include Erum and Emily? Could consider creating a student membership subscription tier/rate.
	Develop sustainable ideas for events/content which would only be free for members (non-members would be charged)	tbc	See separate document for list of membership benefit ideas mooted at Strategic Planning event.
N.B. Need to consider how a digital version of the journal would affect membership packages.			
## AIM: Explore and develop new ways of delivering services			
OBJECTIVE 4: Explore different models for OHS Conferences	**Use 2024 as an opportunity to explore other models** **Create working group to look at how we might reduce financial risk and heavy dependence on volunteers.**	Working group tbc	Showcase event/Webinars/One day events? Need to make a clear and positive statement in this year's AGM/conference that we are exploring different ways of doing things, not doing away with an annual conference. Volunteers for working group - Craig, Alan, Amy, Mary, Rob, Polly
OBJECTIVE 5: Develop OHS Online publications	**Create Web Editorial Group as part of wider Website Management strategy.**	DSG	Website Management Strategy will look at support needs, resources for content development, WP housekeeping, hosting and technical support. Will depend on decisions made re membership process. Web Editorial Group to work in dialogue with Journal Editorial Group.

	Explore options for delivering digital version of Oral History Journal • JEG to talk to JSTOR re moving wall shift for members. • Research how other organisations implement and resource digital journals.	JEG/DSG	More info and thought needed about practicalities such as how it affects web hosting, how to prevent copying, whether to publish as HTML or pdf etc
OBJECTIVE 6: Rebooting Regional Network	Trustee support given to RN action plan and renaming of RN - see **Regional Network Action Plan** below.	RN	
	Changes made to website in wake of rebooting and skills audit of RN	WEG	
OBJECTIVE 7: Revise governance of SIGs	Changes to be made to SIG governance to reflect current operational situation	SIGs	
	Implement agreed approach to distinguishing between members/supporters in SIGs	SIGs	
OBJECTIVE 8: Improve messaging	Use our publications to: • Highlight voluntary nature of OHS (option to donation?). • Emphasise independence of OHJ • Explain relationship between BL and OHS		Someone needs to write the content - e.g. additions to Journal page on website to emphasise its independence. A strapline/subtitle? Where should we explain about OHS & BL? FAQs? On the training home page?
OBJECTIVE 9: better communication with members	Report on membership survey to be published as blog and via newsletter.	Memb. sec/Comms officer	Asap. Needs to address criticisms raised.
	Chair's report at AGM to feed back from Strategic Review and encourage responses to ideas.		

	Onboarding plan for new members, to include guidance on accessing and using membership benefits.		Dependent on membership process action point
	Use newsletter, website etc to highlight membership benefits and how to access them.		e.g. JSTOR search facility
	Bullet point list from committee meetings (data dashboard?) to be sent to OHS constituent parts.		

Regional Network Action Plan

Action	Outcome	Timescale
1. Setting up of a RN Working Group	The RN Working Group will help to support RN coordinators and work to define RN roles and responsibilities.	Call out April 2023 Set up May 2023
2. Define networker roles and responsibilities and revise all existing RN documents	This will reiterate and define the minimum levels of commitment expected from all RN's.	Work to begin May/ June Work to be completed by July 2023

3. Skills Audit of existing Regional Networkers	This will provide an outline of the strengths and weaknesses of the RN members.	(After work for RN Working Group has commenced) Send out June 2023 Review July 2023
4. Renaming the Network	The renaming of the Network will better reflect the roll of the RN.	Send out to network June 2023 Review July 2023
5. Developing guidance protocol for removing networkers from post.	Provide a set process for review and removal of RN's	Timescale to be confirmed.
6. Recruitment of new Networkers. Phase 1.	Agree a Recruitment Plan and a Recruitment Procedure	Phase 1 July/ August 2023
7. Call out for applications for new RNs	Recruitment drive	August/ Sept 2021

8. Interviews for RNs	Applications to be reviewed and interviews carried out	Oct/ Nov 2023
9 Appointment of RNs	Appointment of new RNs numbers to be agreed.	Nov/ Dec 2023
10. Support and mentoring of new RNs	Agreed how new RNs would receive support from existing RNs. To be agreed by RN Working Groups.	Dec 23- Feb 2024
11. Recruitment of young practitioners. Phase 2.	Dependent upon the outcomes of the Strategic Review 2023.	tbc
12: Recruitment of different levels of networker roles Phase 3.	Dependent upon the outcomes of the Strategic Review 2023.	tbc

Actions to be undertaken as a response to member/user feedback in online survey

Feedback from survey	Action	Responsibility	Comments
Need better promotion of membership benefits e.g. lack of awareness of JSTOR access to back issues	• Onboarding plan for new members, to include guidance on accessing and using membership benefits. • Use newsletter, website etc to highlight membership benefits and how to access them.		
Lapsed membership • didn't get around to renewing after membership lapsed. • membership running from January-January rather than for 12 months from the date of joining - deterrent to joining later in the year.	See Objective 1: **Frictionless Joining Process** (rolling 12 month membership to be considered) and Objective 9: **Better communication with members.**		Better access to up-to-date membership data will enable automation of communication.
Perceived gap between academic and non-academic oral history	Consider and develop ideas for member benefits which meet needs of community groups and non-academic interest in oral history. Further develop OHS Blog to reflect non-academic oral history - see OBJECTIVE 5**: Develop OHS Online publications**		
Lack of local involvement/contact/not aware of	See RN Action Plan - expectation management.		

benefits *in my location*/no way of getting involved locally	May also be scope for local online events/meetings?		
Provide more benefits that are exclusively for members	To be addressed under Objective 3		
Consider charging for some of the OHS services	To be addressed under Objective 3		
Perceptions: that OHS is London-centric Lack of visible diversity BL influence	• Trustees are now listed alphabetically on website - possibly more visibly diverse. • Explain in write ups of membership survey how recent recruitment is seeking to address diversity and London-centricity issue. • Suggest that new trustees be asked to write a blog post about their involvement in oral history. • BL relationship to be explained together with voluntary nature of OHS as part of OBJECTIVE 8: **Improve messaging** - in ABOUT US section of website.		
"more opportunities to engage with others'/hold more events and activities/more online or face to face networking/ perhaps start a monthly webinar series, learning session or something to help the community grow and be involved with each other/maybe sponsor a series of promotional talks in hard	See OBJECTIVE 4: **Explore different models for OHS Conferences** and OBJECTIVE 6: **Rebooting Regional Network**		

to get to communities. There are certainly people here in the far northwest that have never heard of the Society, and would benefit from an introduction"			
it would be helpful if there were some kind of discount that could be obtained on hardware/kit/resources by being a member.			
doesn't provide much assistance to *freelance* workers • perhaps more support for freelance/independent oral historians. For example, Columbia OHMA runs excellent services (online) for both people based in the States and internationally. An excellent (free) resource I got last year is the 'Independent Practitioners Toolkit for Oral Historians' and it's a wealth of information, almost like a freelance bible.	To be considered under Objective 3: **Further develop ideas for membership benefits**		
I would like to see the OHS provide Professional Indemnity Insurance as part of the membership package.	Kate Melvin negotiated a discount for members with one company in the past – no longer available?		
Training	Refer to Trainers' Liaison Group		

• more training for different forms of oral history including art, music and photography/ability to become an Accredited Trainer • it would be helpful to have a certificate of attendance for the courses • more training on basics such as use of equipment • I would like training about actually using different types of technical equipment, information about different ways people record and store the information collected and practical sessions on how to annotate recordings, use voice recognition software etc. • more face to face training at venues (major libraries/ universities) outside of London, eg Birmingham Library, Bristol, Oxford, Leeds • clarify process for becoming an Accredited Trainer			
Website • 'neutral' rating for OHS website due to the fact that new website is not yet as full as the previous version, I was used to the former version and knew	Nothing has not been migrated across, and key pages have been redirected where the links have changed. There is a search facility, and it is unclear why it doesn't work for this individual.		

where to find things, saved some links, these are no longer working and I think some content has not yet been migrated across (I couldn't find content via a search). • I would like to be able to see special interest groups more easily. • regarding the Job section of the website, it would be great to maintain access to the previously published vacancies that have expired, they would be useful as references when others are writing job descriptions/benchmarking for salaries etc.	SIGs are on the main menu bar. Perhaps it would be worth considering as a member benefit creating templates for job descriptions, project roles, as well as the already existing but out of date suggested salary costs?		