



OHIO HISTORICAL SOCIETY

Strategic Plan for 2008 – 11

April 2008

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Introduction

The pursuit of history is a quest for understanding the people, events, and places whose stories and experiences influence our lives today. For some, it is personal work, focused on uncovering community and family stories and tracing generations of ancestors. Others' investigations encompass whole time periods, social movements, wars, industries, or populations. Regardless of where we focus our efforts, comprehension of the past provides us with our identity and an ability to make better decisions for today and tomorrow.

Appreciation of history can lead to a engaged citizenry and also offers the thrill of making connections to the past. History well told is appealing and amazing. The true stories of the human condition are alternately funny, inspiring, upsetting, sad, entertaining, touching, astounding, and more.

The mission of the Ohio Historical Society is to help people connect with Ohio's past in order to understand the present and create a better future; this mission reflects the Society's commitment to providing both the worthy outcomes and the sense of excitement promised by history. Our state's past is rife with fascinating stories, encompassing the lives of a diverse array of peoples extending over thousands of years.

The *Strategic Plan for 2008-11* is a roadmap to achieving our mission and making sure that Ohio's stories are shared and preserved. Development of this document commenced in fiscal year 2006 as a team-based effort to update the organization's previous plan, Vision 2000. The 2008-11 plan builds on the direction initiated in 2000 to give OHS a stronger focus in the areas of customer service, education and interpretation, collections and historic sites, and partnerships.

In the following pages, we have identified five mission-based strategic initiatives and measurable goals for achieving implementation while also taking steps to improve our organizational operating capacity and make even stronger connections with our stakeholders and constituents. The plan emphasizes excellence, efficiency, and entrepreneurialism. The basis for strengthening the Society is embedded in our initiatives, increasing our promise for making Ohio's history more meaningful and engaging for Ohioans today and in the future.

Mission, Values & Vision

The mission, values, and vision provide a framework for the *Strategic Plan for 2008-11 (Plan)*, setting the direction and providing a focus for developing action plans and prioritizing the work of OHS.

- The Society's mission statement describes the core purpose of the organization – why it exists, what it does, and for whom.
- The Society's values are closely held beliefs that guide individual and group behaviors, directing the way the institution makes decisions and does business.
- The vision describes what OHS aspires to be in the future, challenging and inspiring us in reaching our goals.

Mission

The mission of the Ohio Historical Society is to help people connect with Ohio's past in order to understand the present and create a better future.

Values

The Ohio Historical Society is committed to excellence and exceeding customers' expectations in all that we do. This commitment rests on a dedication to broad accessibility and inclusiveness in preserving and sharing Ohio's rich and dynamic story. The Society embraces and holds ourselves accountable to these values:

- We preserve Ohio's collective memory and are committed to the authenticity of the "real stuff" of history – the objects, documents, sites and structures that are the physical evidence of our heritage.
- We recognize the importance of partnership and collaboration: teamwork – both within OHS and with our stakeholders and partners – is a hallmark of all our efforts.
- We are committed to accessibility to all of our programs and services and to the decisions we make and the actions we take to plan and carry out our activities.
- We believe in the power of diversity – in the people and organizations we serve, in the programs and services we offer, and in the ideas and perspectives we represent.
- We recognize the contributions of the Society staff and strive to create a workplace that supports mutual respect, excellent communication



and shared decision-making to create opportunities for learning and growth.

Vision

The Ohio Historical Society will be recognized as the nation's most effective statewide advocate for history through its partnerships, leadership and a full array of history related services.

We will achieve a strong, stable financial future through entrepreneurship, creativity, innovation and balanced public/private support.

The Ohio Historical Society will be:

- The first point of entry for all things related to Ohio history.
- Recognized for our leadership in building Ohio's awareness and appreciation of its rich history.
- Known for leveraging partnerships to advance Ohio history.
- Known for empowering all people in using history to transform the quality of their lives.
- Recognized for engaging a variety of communities in delivering history programs and services that are relevant to people's lives.
- Recognized for the breadth and high quality of our customer service.

Strategic Initiatives, Goals & Objectives

I) Strategic Initiative: Enhancing learning and experiences with history in families and groups

(Empower individuals, families and groups to connect with each other and explore how ideas, people and actions in history shape our lives)

1) Use the evidence of the past to empower intergenerational audiences to make personal connections to history.

a) Develop and implement a model for a "full OHS history service" approach to help people connect with history using the Civil War Sesquicentennial. *Time frame: FY08-FY15 Lead: CHPSO*

(1) Develop Statehood Day into the national model for one-day history advocacy programs: Include the Sesquicentennial in Statehood Day efforts and the biennial budget request. *Time frame: FY09 Lead: Administration*

b) Building on the "full OHS history service" model piloted for the Civil War Sesquicentennial, develop a plan using this approach for providing programming that extends outside of OHS facilities. *Time frame: FY11 Lead: Museums*

2) Strengthen the Ohio Historical Society's technological infrastructure to better meet the needs of our customers.

a) Develop and implement a plan for strategic web development that makes ohiohistory.org the primary online resource for people to connect with Ohio's history. *Time frame: FY09-FY11 Lead: Administration*

(1) Develop a REV-approach to improving our technological infrastructure to include our web properties. *Time frame: FY09 Lead: Administration*

(2) Explore the feasibility of implementing customer relationship management software to better serve our customers. *Time frame: FY09 Lead: Administration*

3) Stimulate life-long learning by creating great history experiences using OHS resources.

a) Develop and implement an interpretive plan for the entire organization that focuses on programs and exhibits that



incorporate empowering intergenerational audiences with personally and culturally relevant history experiences. *Time frame: FY08 Lead: Museums*

- (1) Plan for the next generation of exhibits and programming at the Ohio Historical Center and sites. *Timeframe: FY09 Lead: Museums*
- b) Take immediate steps to update, plan for, and ensure excellence in exhibits and programs with a focus on empowering intergenerational audiences with personally and culturally relevant history experiences. *Time frame: FY08 Lead: Museums*
- (1) Successfully execute the Once Upon A Dime exhibit at Ohio Historical Center. *Time frame: FY08 Lead: Museums*
 - (2) Complete the Caniff exhibit within the orientation area. *Time frame: FY08 Lead: Museums*
 - (3) Develop and install the “Quilting African-American Women’s History” exhibit at NAAMCC. *Time frame: FY08 Lead: Museums*
 - (4) Successfully execute the Capture the Moment exhibit at the Ohio Historical Center. *Time frame: FY08 Lead: Museums*
 - (5) Complete the Newark Earthworks interpretive exhibits. *Time frame: FY08 Lead: Museums*
 - (6) Complete the Cedar Bog interpretive exhibits. *Time frame: FY08 Lead: Museums*
 - (7) Complete the Quilt Stories. *Time frame: FY08 Lead: Museums*
 - (8) Implement site installations of the National Road exhibition. *Time frame: FY08 Lead: Museums*
 - (9) Reinstall the Fort Recovery exhibit. *Time frame: FY08 Lead: Museums*
 - (10) Successfully execute the Rockwell’s America exhibit at Ohio Historical Center. *Timeframe: FY09 Lead: Museums*
 - (11) Develop and install an African American art exhibit at the Ohio Historical Center. *Timeframe: FY09 Lead: Museums*

- (12) Raise funds for REV exhibits and accompanying programs. *Timeframe: FY08-09 Lead: IA*
- c) Organize an experience-based approach, overseeing planning and assuring excellent quality, facilities, and customer service. *Time frame: FY09-FY10 Lead: Museums*
- (1) Develop and advocate for the capital budget request. *Timeframe: FY08-09 Lead: Facilities & Administration*
- (a) Advance capital budget request for storage facility. *Time frame: FY08-FY09 Lead: Facilities*
- (2) Create a better understanding of target market needs and interests as a foundation for better relationships and realignment of activities that will foster greater participation in OHS programs. *Time frame: FY09 Lead: Marketing and Business Development*
- (3) Develop strong brand identity and messaging for changing exhibits and their accompanying programs for Ohio Historical Society. *Time frame: FY09 Lead: Marketing and Business Development*
- (4) Move the Ohio Historic Preservation Office into the Ohio Historical Center and reconfigure the Center to better relate to internal and external customer needs. *Timeframe: FY09 Lead: Facilities*
- (5) Implement key Family Friendliness Team recommendations. *Timeframe: FY08 Lead: Museums*
- (6) Complete Grant sites interpretive plan. *Timeframe: FY08 Lead: Museums*
- (7) Complete Rankin site interpretive plan. *Timeframe: FY08 Lead: Museums*
- (8) Complete Morgan's Raid signage and guidebook. *Timeframe: FY08 Lead: Museums & Facilities*
- (9) Implement key recommendations from the Hallways REV Team. *Timeframe: FY09 Lead: CHPSO & Museums*
- (10) Develop a culture and incentive system that promotes effective internal and external customer service and teamwork. *Time frame: FY10 Lead: Administration*

II) Strategic Initiative: Sustaining cultural heritage

(Connect people to the tangible and intangible evidence of the past and preserve this shared heritage for the benefit of future generations)

4) Maximize physical and intellectual control of collections in order to ensure their potential to inform public understanding of Ohio's history.

- a) Revise all current collections documentation to reflect AAM accreditation standards. *Time frame: FY07-FY08 Lead: CHPSO*
- b) Develop a comprehensive integrated and automated collections records system. *Time frame: FY10 Lead: CHPSO*
- c) Establish effective physical control over all collections: launch inventory process. *Time frame: FY09 Lead: CHPSO*
- d) Establish effective physical space for the collections. *Time frame: FY07-FY11 Lead: Facilities*
- e) Make the online collections catalog more complete, accurate and easy to search. *Time frame: FY10 Lead: CHPSO*
- f) Create a plan for cataloging and processing backlog. *Time frame: FY10 Lead: CHPSO*
- g) Develop institution-wide approach to caring for our archives, library and museum collections. *Time frame: FY10 Lead: CHPSO*
- h) Develop institution-wide approach to preserving our historic structures, museums and landscapes. *Time frame: FY11 Lead: Facilities*
- i) Create a plan to help us build a focused, high-quality collection that documents Ohio and Ohioans and complements the collections of other organizations. *Time frame: FY08-FY10 Lead: CHPSO*

5) Provide statewide leadership through leveraging partnerships to preserve and provide access to the evidence of Ohio's past.

- a) Develop a partnership with OPLIN, OGT, OhioLINK, OAHSM and others to create a portal that provides access to the



evidence of the past. *see 1.b. and 16.a., Time frame: FY10
Lead: CHPSO*

- b) Work with Heritage Ohio, Preservation Ohio, OAHSM, SOA and others to create a national model program to preserve historical resources throughout the state. *Time frame: FY11
Lead: CHPSO*
- c) Develop and execute a strategy to preserve and provide access to the evidence of Ohio's recent past. *Time frame: FY11-12
Lead: CHPSO*

III) Strategic Initiative: Building skills for the 21st century

(Foster skills in historical inquiry, analysis, critical thinking and information literacy to explore ideas, respect the diversity of human experience and make informed judgments about issues that affect our lives)

5) **Create statewide teaching programs that are national models in the ways they use historic resources and the ways they form partnerships with other groups.**

- a) Develop and implement an overall strategy for reaching key educational target markets that includes leveraging partnerships such as ODE, Board of Regents and local organizations. *Time frame: FY09
Lead: CHPSO*
 - (1) K-5 *Lead: Museums*
 - (2) 6-12 *Lead: Museums*
 - (3) College & University level: future public historians *Lead: CHPSO*
 - (4) Teachers *Lead: CHPSO*
- b) Improve upon the quality of education outreach programs: History to Go van, case histories, History Day, TAH grant programs, congressional academy. *Time frame: FY08
Lead: CHPSO*
- c) Improve upon the quality of current location-based education programs by incorporating such skills as critical thinking, respect for diversity and historical inquiry. *Time frame: FY10
Lead: Museums*

- d) Strengthen web and other media delivery of content for an education audience via Ohio History Central. *see 2.a. and 16.a., Time frame: FY09 Lead: Museums*

IV) Strategic Initiative: Creating civic engagement

(Bring people and communities together to engage in meaningful activities and constructive dialogue that use our shared past in ways that build citizenship, foster stronger communities and reflect the values of our democracy)

6) **Become the state's leader in facilitating constructive historical dialogue.**

- a) Revise existing meeting formats (i.e. Building Connections, OAHSM regional meetings, virtual experiences) in order to encourage people to engage in meaningful historical dialog that can help build stronger communities. *Time frame: FY11 Lead: CHPSO*
- b) Develop citizenship-building experiences- both physical and virtual- throughout the state in which participants explore current issues and their roots in the past in order to make informed decisions about the future. *Time frame: FY11 Lead: Museums*

7) **Engage and connect people with programs that reflect the cultural diversity of the state.**

- a) Research past and present cultural groups in the state and develop plans to reflect this cultural diversity in OHS programs and services. *Time frame: FY10 Lead: Museums*
- b) Develop partnerships- both current and new- with organizations, groups and individuals in order to leverage our ability to connect people with the state's full cultural diversity. *Time frame: FY11 Lead: Museums*

8) **Strengthen the field of history in Ohio by empowering history-related organizations to use the past to build stronger communities.**

- a) Partner with history-related organizations to develop/identify strategic goals for strengthening the field of history. *Time frame: FY10 Lead: CHPSO*
- (1) Lead development of a statewide Historic Preservation Plan. *Timeframe: FY09 Lead:CHPSO*

- b) Use the OHS portal to gather and disseminate information to help OHS and other history-related organizations to build stronger communities: plan for, develop, and manage an online statewide history calendar and other communication tools. *Time frame: FY09-10 Lead: CHPSO*
- c) Pursue expanded funding for local historical organizations through a statewide tax “check-off” program. *Time frame: FY09 Lead: Administration*

V) Strategic Initiative: Promoting economic development

(Strengthen communities through the use of historic cultural resources to create economic development opportunities)

10) Promote statewide economic development via heritage and cultural tourism.

- a) Research successful models of investments in, funding for, and structures for heritage tourism from other states that could be used to encourage greater investment in Ohio. *Time frame: FY08 Lead: Administration*
- b) Build stronger partnerships at the state and local levels to develop and promote heritage development and experience-based tourism. *Time frame: FY09 Lead: Administration*
 - (1) Participate in the Ancient Ohio Heritage Trail effort. *Timeframe: FY08-09 Lead: Administration / Museums*
 - (2) Participate in the Ohio Heritage Development Program Initiative (Ohio Heritage Areas). *Timeframe: FY08-09 Lead: Administration / Museums*

11) Promote the preservation of historic resources to enhance Ohioans’ quality of life and create opportunities for local economic development.

- a) Develop a strategy to ensure that preservation principles and concepts are included in plans for future growth and current economic revitalization efforts. *Time frame: FY11 Lead: CHPSO*
- b) Develop an effective statewide low-interest loan and technical support program for rehabilitation of historic properties that complements existing loan programs. *Time frame: FY11 Lead: CHPSO*



- c) Build stronger partnerships at the state and local levels to develop a historic preservation agenda that uses historic resources to develop competitive economic advantages for local communities. *Time frame: FY08-FY09 Lead: CHPSO*

VI) Strategic Initiative: Expanding support and authorization

(Build stronger relationships with stakeholders to ensure long-term financial sustainability)

12) Expand and ensure a balanced financial support base to carry out the OHS mission.

- a) Engage state and local legislative stakeholders, learning more about their goals and increasing public awareness of, and investment in, the Society's operations. *Time frame: FY08 Lead: Administration*
- b) Finish the data gathering on the cost to fulfill state mandates at current and appropriate funding levels to establish a target budget and funding mix, and to inform next steps. *Time frame: FY08 Lead: Finance and Administrative Services*
- c) Establish expectations and a business plan for our advancement program including corporate and foundation support, federal grants, annual and planned giving, and capital campaign. *Time frame: FY08 Lead: Institutional Advancement*
 - (1) Benchmark other organizations
 - (2) Assess comparative metrics
- d) Establish expectations and a business plan for OHS membership, cultivating members who are highly satisfied with the services they are provided, active in their participation, and committed to supporting the Society. *Time frame: FY08 Lead: Institutional Advancement*
 - (1) Benchmark other organizations
 - (2) Assess comparative metrics

13) Develop a powerful statewide advocacy network to promote Ohio's history.

- a) Create infrastructure for creating a strong network of advocates for history. *Time frame: FY08 Lead: Administration*



14) Strengthen public awareness of and support for OHS, its programs and its services.

- a) Develop and implement a detailed Society-wide strategic marketing plan. *Time frame: FY10 Lead: Marketing and Business Development*

VII) Strategic Initiative: Strengthening operational capacity

(Develop partnerships and improve internal systems to ensure effectiveness in fulfilling our mission and deepening public value)

15) Strengthen the Ohio Historical Society's effectiveness to better meet the needs of our customers.

- a) Strengthen financial reporting capabilities at OHS. *Time frame: FY08 Lead: Finance and Administrative Services*
- b) Improve safety culture to protect staff, customers and resources; and to reduce lost time, repairs, and insurance costs. *Time frame: FY08 Lead: Facilities*
- c) Improve efficiency and effectiveness of operations. *Time frame: FY08 Lead: All divisions*

Plan-At-A-Glance

I) Enhancing learning and experiences with history in families and groups						
Goal	Objective	Lead	FY08	FY09	FY10	FY11
1) Empower intergenerational audiences to make personal connections to history.						
<i>Authorizing Environment</i>	a) Develop a "full OHS history service" model around the Civil War Sesquicentennial.	CHPSO	x	x	x	
	(1) Include Sesquicentennial in Statehood Day/Biennial Request	ADMIN	x	x		
	b) Building on the "full OHS history service" model piloted for the Civil War Sesquicentennial, develop a plan using this approach for providing programming that extends outside of OHS facilities.	Museums				x
2) Strengthen technological infrastructure.						
<i>Operating Capacity</i>	a) Plan for making ohiohistory.org Ohio's online history resource.	ADMIN		x	x	x
	(1) Improve technological infrastructure, including web properties	ADMIN		x	★	★
<i>Operating Capacity</i>	(2) Explore feasibility of adding customer relationship management software	ADMIN			x	
3) Stimulate life-long learning through great OHS experiences.						
<i>Operating Capacity</i>	a) Develop and implement an organization-wide interpretive plan.	Museums	★			
	(1) Plan for the next generation of exhibits and programming at OHS sites	Museums		★		
	b) Take immediate steps to update, plan for, and ensure excellence in exhibits and programs.	Museums	★			
	(1) Once Upon A Dime	Museums	x			
	(2) Spotlight on Caniff with orientation area	Museums	x			
	(3) Quilting African-American Women's History at NAAMCC	Museums	x			
	(4) Capture the Moment	Museums	x			
	(5) Newark Earthworks interpretive exhibits	Museums	x			
	(6) Cedar Bog interpretive exhibits	Museums	x			
	(7) Quilt Stories	Museums	x			
	(8) Site installations of the National Road exhibition	Museums		x		
	(9) Fort Recovery exhibit reinstallation	Museums		x		
(10) Rockwell's America	Museums		★			
(11) African American Art exhibit development and installation	Museums		x			
(12) Raise funds for REV exhibits and accompanying programs	IA	x	x			

	c) Organize an experience-based approach, overseeing planning and assuring excellent quality in:	Museums		x		
<i>Authorizing Environment</i>	(1) Develop and advocate for the capital budget request	Facilities / ADMIN	x	x		
	(a) Advance capital budget request for storage facility	ADMIN / Facilities	x	x		
<i>Operating Capacity</i>	(2) Research target market needs and interests to increase participation in OHS programs	MKTG		x		
<i>Operating Capacity</i>	(3) Develop strong brand identity and messaging for changing exhibits	MKTG		x		
	(4) Move OHPO into OHC and reorganize Center for better efficiency and service	Facilities		x		
	(5) Family Friendly Team experiences	Museums		x		
	(6) Grant sites interpretive plan	Museums		x		
	(7) Rankin site interpretive plan	Museums		x		
	(8) Morgan's Raid signage and guidebook	Museums / Facilities	x			
	(9) Hallways Team installations	CHPSO / Museums		x		
<i>Operating Capacity</i>	(10) Implement customer service training	ADMIN				x

II) Sustaining cultural heritage

Goal	Objective	Lead	FY08	FY09	FY10	FY11
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4) Maximize physical and intellectual control of collections.

	a) Revise collections documentation to reflect AAM standards.	CHPSO	★			
	b) Develop a comprehensive collections records system.	CHPSO			★	
	c) Establish effective physical control over all collections: inventory.	CHPSO		★		
	d) Establish effective physical space for the collections: storage plan FY08; design FY09.	Facilities	★	★	x	x
	e) Improve the online collections catalog.	CHPSO			★	
	f) Create a plan for cataloging and processing backlog.	CHPSO			x	
	g) Develop institution-wide approach to caring for our archives, library and museum collections.	CHPSO				x
	h) Develop institution-wide approach to historic preservation.	Facilities				x
	i) Develop a collections plan: framework FY08; plan FY10.	CHPSO	x	x	x	



5) Provide statewide leadership through partnerships.						
	a) Develop partnerships to create a web portal to evidence of the past.	CHPSO			★	
	b) Expand partnerships to preserve historical resources throughout the state.	CHPSO				x
	c) Focus on documenting evidence of Ohio's recent past.	CHPSO				x
III) Building skills for the 21st century						
Goal	Objective	Lead	FY08	FY09	FY10	FY11
6) Create model statewide teaching programs.						
	a) Reach key educational target markets through partnerships.	CHPSO		x		
	b) Improve education outreach programs	CHPSO	★			
	c) Improve location-based education programs.	Museums			x	
	d) Strengthen web and other media for an education audience: Ohio History Central.	Museums		x		
IV) Creating civic engagement						
Goal	Objective	Lead	FY08	FY09	FY10	FY11
7) Become the state's leader in facilitating constructive historical dialogue.						
	a) Explore revisions to existing meeting formats.	CHPSO				x
	b) Tie history programming to citizenship-building experiences statewide.	Museums				x
8) Engage and connect people with programs that reflect the cultural diversity of the state.						
	a) Develop plans to reflect Ohio's cultural diversity through OHS.	Museums			★	
	b) Expand diversity programming through leveraging partnerships.	Museums				x
9) Empower history-related organizations to build stronger communities through history.						
	a) Develop/identify strategic goals for strengthening the field of history.	CHPSO			x	
	(1) Lead development of a statewide Historic Preservation Plan.	CHPSO		x		
	b) Create an online statewide history calendar: plan FY09; implement and manage FY10.	CHPSO		x	x	
	c) Pursue expanded funding for local historical organizations: tax check-off.	ADMIN		x		

V) Promoting economic development						
Goal	Objective	Lead	FY08	FY09	FY10	FY11
10) Promote statewide economic development via heritage and cultural tourism.						
	a) Research successful models for heritage tourism.	ADMIN	★			
	b) Build stronger partnerships to promote heritage and experience based tourism	ADMIN		x		
	(1) Ancient Ohio Trail	ADMIN / Museums	x	x		
	(2) Ohio Heritage Development Program	ADMIN / Museums	x	x		
11) Promote the preservation of historic resources.						
	a) Ensure that preservation principles are included in economic revitalization efforts.	CHPSO				x
	b) Develop statewide loans and technical support for rehabilitation of historic properties.	ADMIN				x
	c) Help local communities develop competitive economic advantages through their historic resources.	CHPSO	x	x		

x Action planned within the given fiscal year

★ High priority action for the given fiscal year

NOTE: Throughout FY09, senior managers will be engaged in determining the "next generation" vision for OHS, which will be implemented following the completion of this Strategic Plan.

Planning Calendar

2008

20-May	Planning Session
-	FY09 Details & Decisions
-	Biennial Budget Request Key Issues FY 10-11
Feb	Planning & Assessment Committee Reviews Plan
Feb 25-29	Budget Week--No meetings for managers to allow time for budget development
7-Mar	Budget Follow-Up Day (Prepare for Board/Committee Meetings)
Apr 14-18	Draft FY 10 - 11 Biennial Budget
April	Update Strategic Plan
April	Trustees Approve FY09 Plan & Budget & Review Draft Biennial Budget
July	Start FY09
July - Aug	Planning Sessions (2)
Session 1	Review FY08 Performance on Strategic Plan
Session 1	Implementation Plan for FY09 (fine tune)
Session 2	Review FY 10 - 11 Objectives
Session 2	Draft FY 12 - 13 Objectives
July - Aug	Detail Biennial Budget Request FY 10 - 11
Sept	Trustees Approve Biennial Budget & Review Plan Progress
Sept - Oct	Submit Biennial Budget Request FY 10 -11
Oct - Nov	Review FY 08 - 09 PEGA
Oct - Nov	Draft FY 09 -10 PEGA
Dec	Trustees Confirm FY10 Outcomes & Priorities

2009

Jan - June	FY 10 - 11 State Operating Budget Request Reviewed by General Assembly
Jan	Planning Sessions (2)
Session 1	FY10 Details & Decisions
Session 2	Draft Capital Budget Request Key Issues FY 11 - 12
Feb	Planning & Assessment Committee Reviews Plan
Feb - Mar	Budget Week--No meetings for managers to allow time for budget development
Feb - March	Budget Development FY 10 - 11
March	Trustees Approve FY10 Plan & Draft Budget & Review Capital Budget Key Issues
March	Update Strategic Plan
June	Finalize Budget FY 10 - 11 (based on legislative results)
July	Start FY10
July - Aug	Planning Sessions (2)
Session 1	Review FY09 Performance on Strategic Plan
Session 1	Implementation Plan for FY10 (fine tune)
Session 2	Review FY 11 - 12 Objectives
Session 2	Draft FY 13 - 14 Objectives
July - Aug	Detail FY 11 - 12 Capital Budget Request
Sept	Trustees Approve FY 11 - 12 Capital Budget Request & Review Plan
Sept - Oct	Submit FY 11-12 Capital Budget Request
Oct - Nov	Review FY 09 -10 PEGA
Oct - Nov	Draft FY 10 - 11 PEGA
Dec	Trustees Confirm FY11 Outcomes & Priorities

2010

Jan	Planning Sessions (2)
Session 1	FY11 Details & Decisions
Session 2	Biennial Budget Request Key Issues FY 12 - 13
Feb	Planning & Assessment Meeting on Plan
Feb - Mar	Budget Week--No meetings for managers to allow time for budget development
Feb - Mar	Draft FY 12 - 13 Biennial Budget
Feb - March	Budget Development FY 11 - 12
March	Trustees Approve FY11 Plan & Budget & Review Draft Biennial Budget
March	Update Strategic Plan
July	Start FY11
July - Aug	Planning Sessions (2)
Session 1	Review FY10 Performance on Strategic Plan
Session 1	Implementation Plan for FY11 (fine tune)
Session 2	Review FY 12 - 13 Objectives
Session 2	Draft FY 14 - 15 Objectives
July - Aug	Detail Biennial Budget Request FY 12 - 13
Sept	Trustees Approve Biennial Budget Request & Review Plan
Sept - Oct	Submit Biennial Budget Request FY 12 -13
Oct - Nov	Review FY 10 - 11 PEGA
Oct - Nov	Draft FY 11 - 12 PEGA
Dec	Trustees Confirm FY12 Outcomes & Priorities

Context & Process for Planning

Impetus for Planning

Development of the Ohio Historical Society's *Strategic Plan for 2008-11 (Plan)* commenced in June 2005 as a team-based effort to update the organization's previous plan, *Vision 2000*.

Vision 2000 was crafted and led by a Strategic Planning Committee made up of members of the Ohio Historical Society and Ohio Historical Foundation Boards. The process began in early 1998 and ran through mid-year 2000. Board and staff members worked with a consultant to construct a functional mission statement and identify values and priorities. Staff teams were assigned to benchmark and make recommendations around five key areas: Education, Archives and Collections, Historic Site Operations, Marketing and Development, and Organizational Values and Culture. These team reports led to the final recommendations in the *Vision 2000* document.

In June 2005, The Planning & Assessment Committee (originally known as the Results Evaluation Committee), initiated a revision of *Vision 2000*. The Committee recognized that some revisions were needed in this plan, but given the relatively recent nature of the benchmarking and review that supported the *Vision 2000* document, committee members also felt that a plan update should be undertaken without launching a complete planning process. To accomplish this work, Board and Management Team members adapted the principles described in *Vision 2000* to serve as a foundation for the *Plan*. Input from staff, members, and other constituents influenced new directions and priorities. The planning process is described below.

Process & Timeline for Planning

After the Board of Trustees charged OHS senior management with developing the update to *Vision 2000*, the Management Team convened several times between fall 2005 and 2006 to accomplish this task, reviewing progress and gaining input from trustees at regular intervals. This work progressed in several phases and was organized by a small planning team.

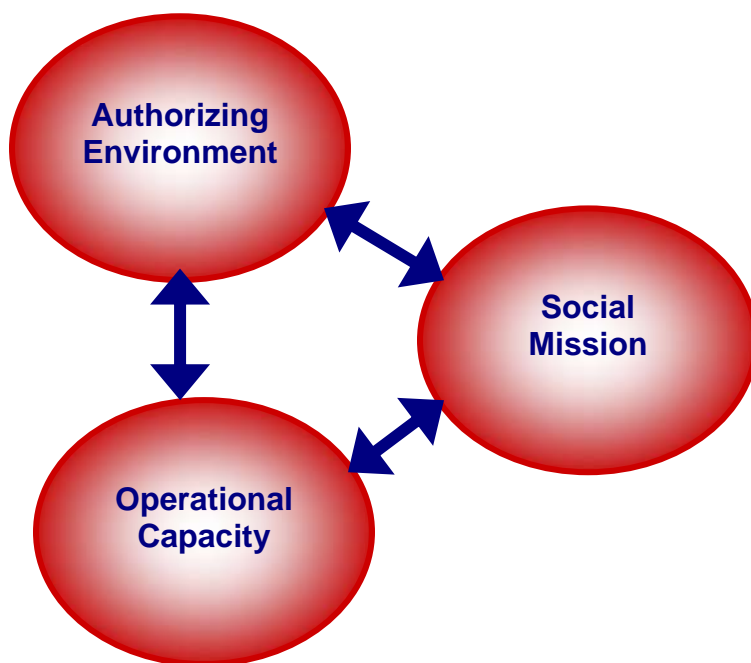
Phase I: Gathering Information and Input and Confirming Core Ideologies centered around soliciting the views of those most invested in the Society. Staff and member surveys took place in August 2005. Survey questions focused around organizational purpose, key audiences, strengths and weaknesses, and future direction. Senior staff also revisited recommendations contained in a March 2002 report and May 2004 implementation plan related to the work of a legislative committee, *The House Select Committee to Study the Effectiveness of Ohio's Historical Partners and Programs*, to ensure that the Society's direction



was consistent with advice received from public officials. Much staff discussion related to strategic planning followed throughout fall and winter 2005. In October, the planning team convened small group staff workshops on the Mission, Vision, and Values, subsequently sharing the results of all completed work with the Results Evaluation Committee.

Phase II: Analysis and Development aimed to make sense of the input and to craft the initiatives that would guide the organization of the *Plan*. Senior managers reviewed the Phase I surveys in November 2005, and the following month, they conducted planning sessions to refine descriptions of OHS' Mission, Values, Vision, and target markets. These statements were approved by the Board of Trustees in March 2006. In May 2006, Senior and department managers participated in planning sessions, including Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analyses and the development of strategic initiatives.

Two major sources influenced senior staff's thinking on the drafting of organizational strategic initiatives. First, Mark Moore's¹ work on "the public value scorecard" was of critical value in orienting organizational thinking around three calculations that should be made in advance of committing to strategic direction. The basic idea behind the public value strategy can be captured "**the strategic triangle**," which is illustrated and described below.



¹ *The "Public Value Scorecard," A rejoinder and an Alternative to "Strategic Performance Measurement and Management in Non-Profit Organizations" by Robert Kaplan.* Mark Moore, March 2002.

- **Social Mission** - The primary point of the triangle (the “public value” circle) focuses attention on the ultimate value that the organization seeks to produce. These goals cannot typically be summarized in financial terms. They describe particular people to be aided in particular ways, or particular social conditions to be achieved.
- **Authorizing Environment** - The second point of the triangle focuses attention on upstream customers, also sometimes described as third-party payers. These are often donors or governments and are always organizations or individuals who support the achievement of the organization’s mission. A nonprofit cannot simply assume that if it produces something of public value that either financial support or legitimacy will be forthcoming. It must earn its standing not just in the community of consumers, but also in the community of donors and governmental entities that are pursuing various public purposes.
- **Operational Capacity** - The third point of the triangle focuses attention on the question of whether an enterprise has the ability to achieve its goals. This part of the triangle extends beyond organizational capacity because nonprofit organizations are trying to achieve large social outcomes and often need other entities in their industry to act as partners, collaborators, or co-producers of the desired results.

Based on this thinking, OHS senior staff developed five mission-based strategic initiatives in addition to two initiatives focused on promoting progress in the other two sections of the strategic triangle: authorizing environment and operational capacity. For fiscal year 2008, the latter two



sections of the triangle were called out into separate initiatives to kick-start our efforts. For the ensuing years, the Society will craft its goals and objectives around the mission-based initiatives and promote progress in building stakeholder relationships and partnering with other entities to enhance operational effectiveness within that work.

A second key influencer in crafting the OHS mission-based strategic initiatives came from national initiatives announced by the Institute for Museum and Library Services in 2006: 1. Enhancing Learning in Families and Communities; 2. Sustaining Cultural Heritage; 3. Building 21st Century Skills; and 4. Creating Civic Engagement. These initiatives seemed ideally matched to OHS' organizational strategic direction. Therefore, staff adapted these categories to statewide priorities for Ohio and added a fifth initiative relating to economic development. These initiatives were approved by the Board of Trustees in June 2006. Next, senior staff worked with OHS departments to develop goals for each initiative. Sixteen goals were selected from an initial list of over 100 suggestions from staff. The Board of Trustees approved the goals in October 2006.

Phase III: Operationalizing the Plan kicked off in late 2006 with the development of objectives to achieve the goals. These were proposed by each division, refined by the small planning team, and then ratified by the full management team. The objectives were then prioritized across two biennia, FY 08 through FY 11. This was a difficult task, as most staff felt the need to accomplish everything within the first fiscal year. Balancing staff and stakeholder goals with organizational capabilities will be an ongoing challenge during the life of the 2008-11 plan. Part of that balance is achieved through designating certain objectives as "high priority," meaning that those objectives will have the highest level of focus and organizational coordination to ensure completion.

Tracking Plan Progress

Progress on the *Plan* is being tracked through three main functions: an individual performance review process, regular planning meetings, and a set of metrics on organizational performance.



In order to begin aligning organizational strategic goals with workload, the Human Resources department introduced a new tool for staff members: The **Performance Evaluation and Goal Alignment (PEGA)** tool. This tool, illustrated at left, was launched in December 2006 and was designed to maximize the human resources talent available within the Society while aligning individual goals and performance to strategic direction. There are three major sections to the PEGA tool: 1) identification of strengths and opportunities in an individual's



abilities against critical institutional competencies, 2) assessment of an individual's performance against established goals and objectives of the prior review period, and 3) creation and approval of individual goals and objectives for the upcoming review cycle. This tool fosters regular employee and supervisor discussion around the work of achieving the *Plan*; it ensures that the plan has a real impact on daily operations.

Another means of operationalizing the strategic plan and ensuring that it has regular impact on the work of the institution, was the development at the start of fiscal year 2008 of an institutional **Planning Calendar**, which includes semi-annual planning meetings attended by department and division managers. The planning calendar marks the timetable for planning and budget sessions, coordinates the linkage between trustee planning and organizational goal-setting, and ties to major State of Ohio biennial and capital budget request milestones.

Planning meetings are held during January and late summer each year. The summer session is designed for 1) reporting on and analyzing progress made during the previous fiscal year and 2) looking ahead to discuss societal trends and stakeholder needs impacting future work of the organization. These discussions form the basis of staff reports to the Board of Trustees in fall and winter and of key objectives for the following fiscal year. Once reviewed and established by the Board, staff then use this guidance to develop detailed workplans. These workplans are proposed by departments and are then reviewed and discussed by staff peers at the second planning workshop in January. The approved workplans then influence the development of operating budgets.

A final aspect of operationalizing the strategic plan relates to the establishment of **metrics** for tracking organizational progress. This work happens at multiple levels throughout the organization. First, the PEGA process carries the plan to the individual. Each staff workplan is developed with "SMART" objectives (**s**pecific, **m**easurable, **a**chievable, **r**ealistic, and **t**imebound) that are reviewed regularly throughout the year. In addition, workplans that are tied to the strategic plan are assigned to a specific OHS program or department, which has responsibility to coordinate work across the institution. This program also develops workplans containing SMART objectives that are reviewed and discussed in the planning meetings. Progress reports on the approved workplans are reported on quarterly to the office of the Chief Operating Officer. This also creates a structured opportunity for staff to renegotiate deadlines based on unforeseen circumstances or opportunities that arise. The COO's office creates a dashboard illustrating the metrics that is disseminated to staff and trustees as part of ongoing communication about plan progress.

Measuring Success

The Ohio Historical Society is committed to fulfilling our mission in a manner that creates the most value from our resources. One of the important ways that the organization ensures that we are succeeding is through the selection and analysis of key measurements. While the Society has traditionally measured effectiveness at the individual program level, we are shifting to assess our progress toward goals that are applicable across the organization and across division and department boundaries. This more broad way of measuring ensures that we choosing measures that help the organization and our stakeholders track the value OHS provides.

Principles for measuring

Less is more. The best measures tell a clear story about the progress of an initiative with the simplest process for collecting the data. Too many measures will overload staff resources and may result in focusing on areas that are not key to our success. Furthermore, overly complicated measures may not be informative enough to repay the organization for the effort required to report them. Thus, the number and complication of metrics will be limited as the Society strives to measure success on the *Plan*.

Use care in selection. In addition avoiding overly complicated measures, OHS also strives to avoid choosing measures that falsely assume causal relationships or that generate unintended consequences/behaviors. The Society generally seeks outcome-focused rather than output-focused measures. For instance, we can simply count the number of people participating in an activity, but a better measure of the success of that activity would be to measure the percentage of participants who agree with the statement that their involvement has helped them become more connected to history. Outcome measures tend to require more staff time than output measures; therefore, they should be carefully selected and used judiciously.

Allow for changing and updating. As the organization works through the strategic plan, it is important to learn from our mistakes and leverage our successes. Measures can help to determine where we have made progress and to provide an early warning system if an undertaking is not creating the intended result. In addition, we will be periodically examining and evolving metrics standards and best practices to provide the most useful management tools for the entire organization.

Ensuring and Assessing Success at OHS

The Society is utilizing a number of assessment approaches to quantitative and qualitative measurement and to providing managers with tools for planning.

Two sets of **planning meetings** each year aid OHS managers in prioritizing objectives for implementation, assessing the resources required to implement those priorities, and allocating resources most efficiently to that end. Team leaders craft work plans that identify where human and capital resources are needed to complete action steps and that set out deadlines and milestones. These meetings also include a review of the dashboard indicators from previous years (see last bullet, below).

The **Performance Evaluation and Goal Alignment (PEGA)** process was designed to align individual goals and performance with the current goals of the Society, allowing the Society to fulfill its mission. The process also has a component to identify employees' developmental opportunities for improved performance, professional growth, and career development. The PEGA process provides a framework for determining core competencies and behaviors for employees, evaluating prior year performance, and aligning future individual goals with the Society's Mission, Values and Vision.

The Society's **visitor experience assessment program** utilizes full-time staff and interns to determine how visitors judge their perceptions of their interactions with exhibits and programs. These assessments have provided baselines and helped OHS to determine whether the organization is advancing toward its goals for visitor satisfaction.

The OHS **Dashboard** is a quarterly tool with a twofold purpose. First, the dashboard is a high-level graphic representation of how well the organization is progressing toward its goals and priorities; this is accomplished through indicators tied directly to fiscal year objectives and the intended results of those objectives. Second, the dashboard allows for quick evaluation of general organizational health over time, evidenced by reporting on the following:

- Attendance
- Membership
- Annual Fund
- Project Donations
- Revenue
- Expenses
- Net Income

Ohio Revised Code Mandated Functions

Sections of the Ohio Revised Code specify the following public functions to be performed by the Ohio Historical Society:

- (1) Operating a **system of state memorials (historic sites and museums)**; (Ohio Revised Code 149.30)
- (2) Protecting, or restoring structures, earthworks, and monuments; (Ohio Revised Code 149.30)
- (3) Serving as the **state archives**; (Ohio Revised Code 149.30 and 149.31 - 149.43)
- (4) Administering a **state historical museum**, to be the headquarters of the society and its principal museum and **library**; (Ohio Revised Code 149.30)
- (5) Establishing a marking system to identify **historic and archaeological sites**; (Ohio Revised Code 149.30)
- (6) **Publishing books, pamphlets, periodicals**, and other publications about history, archaeology, and natural science and supplying one copy of each regular periodical issue to all public libraries; (Ohio Revised Code 149.30)
- (7) Engaging in **research in history, archaeology, and natural science** and providing historical information upon request to all state agencies; (Ohio Revised Code 149.30)
- (8) **Collecting, preserving, and making available** by all appropriate means and under approved safeguards manuscript, print, or near-print library collections and all historical objects, specimens, and artifacts; (Ohio Revised Code 149.30)
- (9) Encouraging and promoting the organization and development of **county and local historical societies**; (Ohio Revised Code 149.30)
- (10) Providing Ohio schools with materials to **facilitate the instruction of Ohio history**; (Ohio Revised Code 149.30)
- (11) Providing **advisory and technical assistance to local societies** for the preservation and restoration of historic and archaeological sites; (Ohio Revised Code 149.30)
- (12) Devising **uniform criteria for the designation of historic and archaeological sites**; (Ohio Revised Code 149.30)
- (13) **Taking inventory and maintaining an active registry of significant designated and undesignated state and local archaeological sites**; (Ohio Revised Code 149.30)
- (14) Contracting with the owners or persons having an interest in designated historic or archaeological sites or property adjacent or contiguous to those sites, to **restore or preserve the historical or archaeological significance or educational value** of designated historic or archaeological sites; (Ohio Revised Code 149.30)

- (15) Maintaining a **state registry of archaeological landmarks** of significance; (Ohio Revised Code 149.51)
- (16) **Preserving archaeological and historic sites through survey and salvage work** relating to public improvements on state lands in cooperation with state agencies and political subdivisions; (Ohio Revised Code 149.53)
- (17) **Establishing a program to locate, identify, and evaluate abandoned historical property and other resources in Lake Erie**, as well as approving certain rules and permits allowing for the recovery, alteration, salvage, or destruction of abandoned historical property associated with submerged watercraft or aircraft; (Ohio Revised Code 1506.31 – 1506.33)
- (18) Preserving significant archaeological sites by accepting articles of dedication that **establish preserves**; (Ohio Revised Code 149.52)
- (19) Constructing a **monument honoring Governor James A. Rhodes**; (Ohio Revised Code 149.30)
- (20) Commissioning a **portrait of each departing governor**, which shall be displayed in the capitol building; (Ohio Revised Code 149.30)
- (21) Planning and **developing a center at the capitol building for the purpose of educating visitors about the history of Ohio**, including its political, economic, and social development and the design and erection of the capitol building and its grounds; (Ohio Revised Code 149.30)
- (22) Submitting an **annual report** of its activities, programs, and operations to the governor within two months after the close of each fiscal year of the state; (Ohio Revised Code 149.30)
- (23) Establish an **Ohio Historic Site Preservation Advisory Board** to assist the Society in site preservation and encourage designation of suitable sites on the National Register; (Ohio Revised Code 149.301)
- (24) Establish and operate the **National Museum of Afro-American History and Culture** in Wilberforce and create **Planning Council** to advise the Society in the performance of its duties at this site; (Ohio Revised Code 149.302 and 149.303)
- (25) Maintain inventory of **historic homesteads** consisting of properties in the possession of a family for one hundred years or more; (Ohio Revised Code 149.304)
- (26) House the **African-American Hall of Fame** at the Ohio Historical Center in Columbus; (Ohio Revised Code 149.305)
- (27) Encourage and promote the celebration of “**Ohio Statehood Day**” annually on March 1; (Ohio Revised Code 5.22.4)
- (28) Facilitate and review **state historic rehabilitation tax credit projects**. (Sub. House Bill 149, signed into law on Jan. 2, 2007)

Additionally, the Ohio Revised Code specifies that the Ohio Historical Society be represented on several state boards and commissions, including the Capitol Square Review & Advisory Board, the Governor's Residence Advisory Commission, the African-American Hall of Fame, and the Muskingham River Advisory Council.