



Oklahoma Historical Society

Strategic Plan FY 2025–FY 2027

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About the Oklahoma Historical Society

Founded in 1893 by members of the Territorial Press Association, the Oklahoma Historical Society (OHS) has been dedicated to preserving Oklahoma's rich and diverse history for over a century. As a state agency and private membership organization, the OHS collects, preserves, and shares the stories of Oklahomans, their communities, and the events that have shaped the state's history. Operating museums, historic sites, and affiliates across the state, the OHS offers research archives, exhibits, educational programs, historic preservation resources, and publications to chronicle the rich history of Oklahoma.



Caretakers of the OHS's growing collections, c. 1910.

Left to right: Edith Knean, file clerk; Lon Wharton, secretary; Jasper Sipes, president; and W. P. Campbell, historical custodian (20058, OHS Photograph Collection).

Mission and Vision

The **mission** of the OHS is to collect, preserve, and share the history and culture of the state of Oklahoma and its people.

The **vision** of the OHS is to be the leading historical institution that preserves and promotes Oklahoma's history and culture with creativity and innovation. The OHS engages and inspires through dynamic programs, educational resources, and meaningful partnerships—connecting the past, present, and future.

Guiding Principles

At the OHS, the guiding principles reflect the organization's commitment to excellence and dedication to its mission. These principles are one of the foundations upon which the OHS builds its strategies and makes decisions:

- We collaborate as a team, sharing our ideas while supporting others.
- We embrace creativity and seek to bring life to our subject matter.
- We respect and value each other and our ideas, opinions, and perspectives.
- We are flexible and adaptable to best serve the needs and goals of the organization and the public.
- We learn from the past, are engaged by the present, and innovate for the future.
- We are effective and engaging communicators, both internally and externally.
- We are passionate about telling the story of Oklahoma's history, its people, and their culture.
- We establish clear expectations, encourage professional development, and embrace accountability.
- We celebrate what is both common and different to become a wiser and more inclusive organization.

Public Services

As a state agency, the OHS is dedicated to serving the people of Oklahoma by ensuring their unique history and heritage is valued and accessible. Through a variety of public services, the OHS enriches the lives of Oklahomans by fostering a deeper understanding and appreciation of the state's rich history.



Archives and Collections: Invaluable repositories housing diverse documents, artifacts, and materials essential for preserving Oklahoma's cultural heritage.



Educational Initiatives: Programs, workshops, and curriculum support to engage learners of all ages and foster a deeper connection to the state's history.



Online Resources: Digital archives, virtual exhibits, educational resources, and interactive tools to explore Oklahoma's history.



Museums and Historic Sites: Over 20 locations statewide that offer immersive experiences showcasing Oklahoma's cultural and historical significance.



Programs and Exhibits: Interpretive exhibits and thematic programs designed to educate diverse audiences about Oklahoma's past and present.



Historic Preservation: Support and advocacy for preserving historic sites and buildings throughout Oklahoma.

Strategic Planning Process

In May 2023, the OHS enlisted the Oklahoma Center for Nonprofits (OKCNP) to facilitate a three-year strategic plan. The strategic planning process involved several steps, including stakeholder surveys, facilitated sessions, and a comprehensive SWOT analysis to ensure a well-rounded and effective plan.

Stakeholder Survey Summary

Obtaining stakeholder feedback was a crucial step in the strategic planning process. On November 2, 2023, a survey was distributed to more than 3,000 stakeholders, including OHS members, community partners, Board of Directors, and staff. The survey yielded 277 responses and provided valuable insights into the views and expectations of stakeholders. The feedback gathered from the survey highlighted key strengths and opportunities for improvement, which informed the development of the OHS's strategic priorities and goals.



Strengths

The survey results affirm several key strengths OHS will continue to build upon:

1. **Engaged Audience:** The OHS has a solid foundation of support that includes OHS members, history enthusiasts, genealogical organizations, educators, scholars, and community organizations.
2. **Credibility and Mission Clarity:** Most respondents view the OHS as a credible and reliable source of information and have a clear understanding of its mission.
3. **Valued Programs:** The community highly values the OHS's efforts in historic preservation and accessibility of records, exhibits, and publications.
4. **Community Engagement:** The OHS's wide range of services, publications, and online resources are frequently utilized, reflecting strong community engagement.
5. **Digital Communication:** The preference for email newsletters, social media, and the online event calendar indicates successful digital engagement strategies.

Areas for Improvement

The survey also highlights critical areas that require attention to enhance the OHS's impact and effectiveness:

1. **Representation and Membership Diversity:** Improving inclusive representation and diversifying membership demographics is essential.
2. **Marketing and Outreach:** Enhancing marketing strategies and event outreach efforts will broaden reach and engagement.
3. **Staffing and Coordination:** Addressing staffing shortages and improving coordinated event planning are necessary to support initiatives.
4. **Program and Exhibit Engagement:** Developing more engaging family-oriented programs and exhibits.
5. **Internal Resources and Communication:** Strengthening internal communication, improving collections storage, and providing better professional development resources for staff are vital for organizational health.

Conclusion

The survey results provide a clear roadmap for developing the strategic plan. By leveraging its strengths and addressing areas for improvement, the OHS can better fulfill its mission. Integrating these insights will ensure that the strategic plan is aligned with the needs and expectations of the OHS and the community it serves.

SWOT Analysis Summary

During a two-day facilitated session in January 2024, led by Lauri Monetti from OKCNP, 22 OHS staff members and six OHS board members conducted a SWOT analysis. This analysis helped identify internal **strengths** and **weaknesses** as well as external **opportunities** and **threats** facing the OHS. The SWOT analysis was instrumental in shaping the strategic plan by highlighting the areas where the OHS excels and pinpointing the challenges and opportunities that must be addressed to achieve its mission and vision.

Strengths

The OHS benefits from numerous strengths that contribute to its success. A **dedicated staff** and a **clearly defined mission**, supported by an **engaged board**, are at its core. The OHS boasts **impressive collections** and is well-regarded for its publication, *The Chronicles of Oklahoma*. **National affiliations** and continuous

donations enhance its **credibility and resources**. Publications like *Mistletoe Leaves*, high **engagement on social media**, and a **robust website** add to its strong reputation.

Offering a wide range of services across the state, the OHS enjoys an **excellent academic reputation**. Its **collections** and **numerous museums and historic sites** highlight its commitment to Oklahoma's history. **Geographic diversity** ensures accessibility, while **educational resources** are a significant asset. Its **positive rapport with the Oklahoma Legislature** and **dedication to historic preservation** bolster its standing. **Online catalogs, genealogy research services**, and a **strong volunteer base** enhance public access to historical information.

Finally, the OHS's **longevity** underscores its relevance and significance.

Weaknesses

The OHS faces key challenges in **representation** and **effective marketing**, which limit its reach. The organization is often **short-staffed**, hindering its ability to expand services. There is a lack of **coordinated event planning, underperforming gift shops**, and insufficiently engaging **family-oriented programs and exhibits**. **Membership demographics** lack diversity, and **staff** are frequently **overburdened**.

Additional struggles include **inadequate collection storage capacity**, poor **internal communication**, and a **disconnect between the Oklahoma City headquarters and field sites**. **Insufficient staff resources** and **professional development opportunities, unclear job roles**, and **high turnover among experienced staff** due to retirements further exacerbate these issues. **Staff retention** and **pay** are ongoing challenges, and **aging infrastructures** require attention.

Opportunities

Enhancing the **functionality and networking capabilities of friend groups** can open new legislative connections. There is potential to engage untapped **diverse audiences** through targeted outreach and new **partnerships with organizations, institutions, and specialized groups**. **Strengthening partnerships, diversifying revenue sources**, and adopting **emerging technologies** can further bolster the OHS's efforts. Significant **milestone celebrations**, like the Route 66 centennial, and **expanding events in rural areas** present unique opportunities to increase engagement and visibility. Additionally, offering **paid internships** can attract fresh talent and invigorate the organization.



Threats

Economic fluctuations pose risks to funding, while shifts in **state administration priorities** and **evolving technology** add uncertainty. **Political divisiveness** and the **post-COVID world** present additional challenges alongside an **aging supporter base** and **competing donor pools**. Balancing **digital and physical engagement**, addressing **modern historical narratives**, and combating **public apathy** are ongoing concerns. **Time constraints**, competition from other **entertainment options**, and **declines in the rural population** further complicate the landscape.




OHS board members and staff at facilitated sessions.

Strategic Priorities, Goals, and Objectives


Overview

Informed by the stakeholder survey, SWOT analysis, facilitated sessions, conversations with key staff, and results from two OHS employee satisfaction surveys, the OHS has identified four strategic priorities. These priorities are designed to enhance organizational infrastructure and sustainability, boost financial resources and community engagement, optimize internal operations and staff development, and ensure program effectiveness and community impact. Each strategic priority has accompanying goals and objectives listed below. A full breakdown of strategies, action steps, and evaluation metrics can be found in the appendix of this document.

Strategic Priority: Enhancing Organizational Infrastructure and Sustainability

 **Goal 1: Develop and implement a pilot program for a long-range capital improvement plan.**

Objective: Create a strategic and sustainable capital improvement pilot program that ensures the optimal maintenance, modernization, and expansion of a select number of OHS facilities and infrastructure, with the intention of scaling up in the future.

 **Goal 2: Utilize available technology to enhance services for all OHS stakeholders, including employees, patrons, and partners.**

Objective: Develop and implement a comprehensive technology plan for the OHS.

Strategic Priority: Boosting Financial Resources and Community Engagement

 **Goal 3: Increase fundraising via membership and annual giving funds by 5% each fiscal year.**

Objective: Revise development and membership programs to increase fundraising and improve donor and member engagement.



Goal 4: Increase marketing across the OHS.

Objective: Increase OHS brand awareness across the state to support increased visitation and use of public services.

Strategic Priority: Optimizing Internal Operations and Staff Development



Goal 5: Strengthen staff development and optimize internal processes.

Objective: Improve staff development, procedures/policies, and internal communication to create a cohesive and efficient organizational environment.

Strategic Priority: Ensuring Program Effectiveness and Community Impact



Goal 6: Enhance OHS programs by improving their quality and reach.

Objective: Review OHS programs and staff time to identify opportunities for targeted scalability, creating and enhancing programs that best serve Oklahomans without overburdening staff.



Keelboat demonstrations at Fort Gibson Historic Site.

Next Steps and Implementation

To ensure the successful execution of the strategic plan, the OHS will adopt a flexible approach, recognizing the dynamic nature of its operating environment. The implementation strategy includes the following key components:

1. Division-Specific Goals:

In addition to the goals listed in this plan, each division within the OHS will work toward long-range goals specific to their divisional needs and aligned with the OHS's strategic priorities.

2. Role of the Director of Strategic Initiatives:

The Director of Strategic Initiatives will oversee the implementation and accountability. Responsibilities include coordinating reviews, engaging stakeholders, adjusting the plan as conditions change, reporting progress, and seeking approval for modification from the OHS Board of Directors as needed.

3. Living Document Approach:

The strategic plan is a living document intended to evolve with the organization and the broader context in which it operates. This approach ensures the plan remains relevant, actionable, and aligned with the OHS's mission and vision. The OHS will continue to rely on its statutes and foundational documents such as its Constitution and Bylaws and Historic Context Review.

- **Stakeholder Engagement:**

Ongoing engagement with stakeholders will be crucial. The Director of Strategic Initiatives will actively seek and incorporate feedback from members, partners, and the community.

- **Adaptive Strategies:**

Goals, objectives, strategies, and action steps will be adaptable, allowing modifications as new opportunities or challenges arise.

4. Regular Review and Updates:

To ensure effective implementation, the OHS will conduct regular reviews of the strategic plan. This will include quarterly progress reviews and an annual retreat.

- **Quarterly Progress Reviews:**

These meetings will assess progress, identify obstacles, make data-driven adjustments, and celebrate achievements.

- **Annual Strategic Retreat:**

A comprehensive review involving key staff and board members to reflect on progress, update the SWOT analysis, and realign strategies.

5. Goal Lead and Project Teams:

Each goal will have a designated lead responsible for tracking progress, recommending adjustments, and ensuring alignment with the goal's objective. Additional staff will form a project team to support the lead in executing the necessary tasks and achieving the goal. The goal lead will provide regular updates to the Director of Strategic Initiatives regarding the project's status.

6. Action Plans:

Utilizing the strategies and action steps outlined in this document, the project team will develop a comprehensive action plan that includes specific tasks, responsible parties, deadlines, and performance metrics. These action plans will be dynamic, allowing for regular updates and modifications.

By following these steps, the OHS will foster collaboration, accountability, and continuous improvement—ensuring the achievement of its goals and making a meaningful impact on collecting, preserving, and sharing Oklahoma's history.



OHS staff members pose with their Above and Beyond Awards.

Acknowledgments

The OHS extends its gratitude to the following individuals who dedicated their time, expertise, and energy to the strategic planning process. In addition to the retreat, many important conversations and reviews took place, contributing significantly to the development of our strategic plan. Their contributions were instrumental in shaping the direction and future of our organization.

OHS Staff:

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Karen Whitecotton, Deputy Executive Director
Nicole Harvey, Director of Strategic Initiatives

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OHS Board of Directors Strategic Planning Committee:

Duke R. Ligon (President), T.S. Akers, Cheryl Evans, Billie Fogarty, Shirley Ballard Nero, Donna Sharpe, and Jim Waldo.

Appendix: Strategic Plan Framework

Strategic Priority: Enhancing Organizational Infrastructure and Sustainability

Goal 1: Develop and implement a pilot program for a long-range capital improvement plan

Objective: Create a strategic and sustainable capital improvement pilot program that ensures the optimal maintenance, modernization, and expansion of a select number of OHS facilities and infrastructure, with the intention of scaling up in the future.

Strategies and Action Steps

1. Select pilot sites	2. ID current assets	3. Create a conditions assessment	4. Create a repair/improve/replacement cost estimate	5. Implement a repair/improve/replacement plan
1a. Develop criteria for selecting pilot sites.	2a. Evaluate how similar organizations define capital assets to identify best practices.	3a. Identify and assign who (internal/external) to accomplish this and the associated expenses.	4a. Review industry standards for assets use lifespan.	5a. Create a matrix for prioritization, identify criteria for scoring, and determine criteria for weighting.
1b. Conduct an evaluation of all OHS sites against the selection criteria.	2b. Evaluate current inventory.	3b. Develop a formula for assessment.	4b. Estimate percentage increase in cost based on number of years from “today.”	5b. Develop a report listing all priorities based on the matrix.
1c. Select pilot sites based on evaluation and criteria.	2c. Establish a process for new or updated inventory, including who and how.	3c. Create a final report.		5c. Establish schedule for review and updates to plan and matrix.

Evaluation and Measurements

Completion of pilot site selection (Q2, Year 1).	Completion of asset inventory for pilot sites. (Q3, Year 2).	Completion of conditions assessment report (Q3, Year 3).	Development of cost estimates based on industry standards and future projections (Q3, Year 3).	Prioritized list of projects and implementation schedule (Q4, Year 3).
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Strategic Priority: Enhancing Organizational Infrastructure and Sustainability

Goal 2: Utilize available technology to enhance services for all OHS stakeholders, including employees, patrons, and partners.

Objective: Develop and implement a comprehensive technology plan for the OHS.

Strategies and Action Steps

1. Create and maintain an accurate inventory of technology assets	2. Identify opportunities for improvement in current technology and infrastructure	3. Assess costs of equipment and opportunities for cost-saving measures	4. Determine a prioritization strategy and develop a roadmap	5. Implement roadmap
1a. Conduct a comprehensive audit.	2a. Assess the performance, reliability, usage, and usability of current technology assets.	3a. Create a detailed cost analysis for upgrading or replacing technology assets.	4a. Prioritize needs based on impact and feasibility.	5a. Upgrade and install new technology according to the roadmap (4b).
1b. Implement technology asset tracking database and actualize plan to ensure database remains up to date at all times.	2b. Gather stakeholder feedback.	3b. Identify cost-saving opportunities by exploring bulk purchases, grants, and partnerships that can reduce costs.	4b. Create a technology roadmap.	5b. Train staff and stakeholders on new technology.
	2c. Research best practices and innovations.			5c. Monitor and evaluate performance and gather feedback.

Evaluation and Measurements

Comprehensive technology inventory report (End of Year 1).	Identified opportunities for improvement and cost-saving measures via an audit report (End of Year 2).	Successful completion of the roadmap (End of Year 3).	Improved technology performance and usability as measured by stakeholder feedback (Ongoing from Year 3).
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Strategic Priority: Boosting Financial Resources and Community Engagement

Goal 3: Increase fundraising via membership and annual giving funds by 5% each fiscal year

Objective: Revise development and membership programs to increase fundraising and improve donor and member engagement.

Strategies and Action Steps

1. Optimize Constituent Relationship Management (CRM) database and Point of Sale	2. Improve and expand the Annual Giving Campaign (AGC)	3. Streamline grant-seeking efforts	4. Foster relationships with existing and prospective donors	5. Enhance Membership Program
1a. Improve donation and membership portal experience (in coordination with goal 2).	2a. Strengthen data collection and evaluation methods.	3a. Create agency-wide procedures for grant-seeking and grant management.	4a. Improve recognition and stewardship opportunities for major donors.	5a. Establish new membership levels and benefits.
1b. Establish data input procedures and policies for CRM.	2b. Incorporate multi-channel communication strategies for AGC.	3b. Provide additional training and support for agency grant writers.	4b. Develop a comprehensive gift acceptance policy.	5b. Increase membership outreach/events.
1c. Update CRM system structure to be more usable.	2c. Create a more streamlined user experience in coordination with Membership.	3c. Increase access to relevant grant opportunities through improved internal communication.	4c. Expand outreach to prospective donors through targeted communication.	5c. Increase marketing efforts to expand membership reach in conjunction with efforts in goal 4.
	2d. Improve communication of agency-wide giving opportunities.			5d. Incorporate multi-channel strategies for membership communication.

Evaluation and Measurements

Improved data-driven decision-making and end-user functionality (End of Year 1).	Growth in AGC contributions by 5% each fiscal year (Annual).	Established procedure and capacity for grant applications (End of Year 2).	Number of new donors and increased donor retention rate (Annually after End of Year 2).	Increase in membership retention and membership revenue by 5% (End of Year 2).
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Strategic Priority: Boosting Financial Resources and Community Engagement

Goal 4: Increase marketing across the OHS

Objective: Increase OHS brand awareness across the state to support increased visitation and use of public services.

Strategies and Actions Steps

1. Research and evaluate current efforts	2. Devise and implement a marketing plan
1a. Analyze current marketing strategies and campaigns to determine effectiveness and return on investment, including staff time, cost, and effectiveness.	2a. Define target audience (for appropriate medium) and tailor marketing messages to different demographics.
1b. Conduct surveys and focus groups to gather feedback from visitors and the public.	2b. Create objectives and tactics to include both paid and unpaid opportunities.
1c. Identify strengths and areas for improvement based on the evaluation.	2c. Identify funding and establish budget.
	2d. Include strategies for brand merchandising within the overall marketing plan to ensure merchandise reflects the updated brand identity and appeals to a broader audience.
	2e. Implement marketing plan based on performance metrics and feedback.

Evaluations and Measurements

Increased brand awareness as measured by visitor surveys and public feedback (End of Year 2).

Increased visitation to OHS facilities by 5% (End of Year 3).

Improved return on investment on marketing campaigns (Quarterly).

Strategic Priority: Optimizing Internal Operations and Staff Development

Goal 5: Strengthen staff development and optimize internal processes

Objective: Improve staff development, procedures/policies, and internal communication to create a cohesive and efficient organizational environment.

Strategies and Action Steps

1. Increase utilization and prioritization of professional development	2. Increase employee satisfaction by 5%	3. Review, develop, and update internal policies and procedures.	4. Implement Performance Reviews (PMP) with updated job descriptions	5. Enhance internal communications
1a. Identify barriers via survey/focus groups.	2a. Continue to conduct and analyze employee satisfaction surveys to gather feedback and ID areas for improvement.	3a. Conduct a comprehensive review of policies and procedures to identify outdated or inefficient practices.	4a. Implement a PMP that includes regular performance reviews, goal setting, and feedback mechanisms.	5a. Improve existing communication to ensure transparency from leadership on decisions and budget allocation.
1b. Enhance awareness by promoting professional development opportunities and creating a Teams channel to share resources and ideas.	2b. Continue to develop strategies to address key areas of dissatisfaction and communicate those efforts to staff.	3b. Engage a cross-functional team to provide input and suggestions for policy improvements.	4b. Review and revise job descriptions and PMPs for all positions to ensure clarity and alignment with organizational goals.	5b. Prioritize email communication for important updates as preferred by staff.
1c. Ensure professional development goals are clearly defined and integrated into performance reviews.	2c. Enhance feedback mechanisms to receive staff feedback on implemented changes and suggest further improvements throughout the year.	3c. Update and/or develop policies/procedures to reflect current best practices and ensure compliance with legal and regulatory requirements.	4c. Train managers and supervisors on conducting effective performance reviews and providing constructive feedback.	5c. Prioritize active listening from leadership through regular feedback sessions to ensure staff voices are heard and considered in decision-making processes.
1d. Provide time and incentives, such as the allocated time during the workday and recognition programs.	2d. Strengthen recognition and reward programs to celebrate staff achievements.			5d. Conduct a survey mid-implementation to assess improvements in communication.

Evaluation and Measurements

Increased participation in professional development activities by 10% (End of Year 1).	5% increase in employee satisfaction as determined by employee survey (End of Year 3).	Updated and improved internal policies and procedures (End of Year 2).	Effective implementation of PMP with updated job descriptions (End of Year 2).	Improved internal communication as measured by staff surveys (End of Year 2).
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Strategic Priority: Ensuring Program Effectiveness and Community Impact

Goal 6: Enhance OHS programs by improving their quality and reach

Objective: Review OHS programs and staff time to identify opportunities for targeted scalability, creating and enhancing programs that best serve Oklahomans without overburdening staff.

Strategies and Action Steps

1. Define and Evaluate Programs	2. Staff Time Analysis/Resource and Time Assessment	3. Targeted Scalability Framework	4. Stakeholder Engagement	5. Community-Centric Program Development	6. Continuous Improvement
1a. Define and gather quantitative and qualitative data on current OHS programs.	2a. Review and analyze current resource and time usage across different programs and activities.	3a. Develop criteria for targeted scalability of OHS programs.	4a. Form a task force comprising representatives from various departments and community partners.	5a. Engage with local communities to identify historical and cultural priorities.	6a. Regularly collect and analyze input to assess and adjust programs and staff time management.
1b. Conduct surveys and interviews with staff, volunteers, and community partners.	2b. Identify opportunities for improving efficiency and reducing unnecessary burdens on staff.	3b. Create a roadmap for implementing scalable solutions in strategically important areas.	4b. Hold regular meetings and workshops to gather input and foster a collaborative approach.	5b. Design and pilot new programs that reflect the identified needs and interests of Oklahomans.	6b. Develop key performance indicators (KPIs) to measure the success of changes.
1c. Perform a gap analysis to identify areas for improvement, focusing on community impact and relevance.		3c. Pilot scalable initiatives and assess their impact on staff workload and program effectiveness.	4c. Communicate progress and updates to all stakeholders to ensure transparency.	5c. Evaluate the effectiveness and community response to these new programs.	6c. Schedule regular reviews and updates to the targeted scalability framework and resource allocation strategies.

Evaluation and Measurements

Comprehensive data collection and analysis report (End of Year 1).	Efficiency improvements and reduced staff burden (End of Year 2).	Successful pilot of scalable initiatives (End of Year 3).	Increased community engagement and satisfaction (End of Year 3).	Implement improvements based on collected input and KPIs. (Ongoing from Year 3).
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