Oberlin Heritage Center Strategic Plan for 2018–2023

Introduction
This is the eighth strategic plan created by and for the Oberlin Heritage Center (OHC). It was crafted over an eight-month period beginning in September 2017, with input from staff, board, volunteers, OHC members, community members, and strategic plan facilitator Leslie Yerkes. The plan was adopted by the Board of Trustees at its meeting of May 2, 2018. An account of the planning process can be found near the end of this document.

Mission Statement
The mission of the Oberlin Heritage Center is to preserve and share Oberlin’s unique heritage and to make our community a better place to live, learn, work, and visit.

Core Values
Integrity: OHC commits to authenticity, accuracy, and excellence in management and governance, and strives to be worthy of the public’s trust.
Openness: OHC embraces diversity of participation, ideas, opinions, and action.
Innovation: OHC nurtures creative thinking and active learning.
Engagement: OHC seeks to involve the community in relevant and vital discussion and action.
Sustainability: OHC commits to being a strong and visible organization that provides continuity and leadership.
Stewardship: OHC strives to protect and preserve Oberlin’s history and historic buildings and resources for future generations.
Leadership: OHC strives to be a leader among the historical organizations in the county, state, and nation.

Vision Statement
The Oberlin Heritage Center is a small and dynamic organization whose strengths lie in engaged supporters, quality programs, professional services, and positive collaborations. While OHC will continue to build on and draw from those defining strengths, strategic planning discussions revealed additional directions that will be key to the organization's continued relevancy in the community: 1) to seek out, explore, preserve, and encourage the sharing of histories that accurately reflect a diversity of individuals, perspectives, and experiences 2) to provide opportunities for individuals to connect with one another and with the community, and 3) to foster, especially in younger generations, appreciation for history and critical consideration of its impact on the present and future.

Working from these insights and the goals outlined in this plan, we envision that in five years the Oberlin Heritage Center will be an organization through which all community members can discover history resources relevant to their personal experiences. OHC will strive to have the financial, physical, and human resources necessary to achieve its mission and address future challenges. OHC will be regarded as a valued partner that supports community history projects and whose programs foster meaningful relationships and deeper connections within the community and region.
Executive Summary

This plan is framed around seven key areas of operation and engagement. In brief, the plan:

- Continues to direct programming towards interpretation that ensures wide and diverse engagement.
- Ensures organizational sustainability and the preservation of the valued historic buildings and collections of OHC through the growth of an endowment fund and the continued cultivation of supporters.
- Calls for OHC to address challenges and opportunities related to its facilities and strengthen management of its subsidiary properties (OHCP and Vineway).
- Calls for a board actively engaged in fundraising, organizational advocacy, and strategic improvement.
- Reaffirms OHC’s commitment to an active and well-compensated staff, builds a workforce that embodies the diversity of the community, and directs action toward becoming more environmentally friendly, maintaining professional certifications, and being prepared for digital threats and opportunities.
- Calls for short-term and long-term improvements in the acquisition, management, storage, and display of collections and history resources, with goals specific to conservation projects, collecting more recent history, improving OHC's digital holdings and access, and administering the Oberlin Oral History and Westwood Cemetery projects.
- Details various strategies to enhance OHC's physical, virtual, collaborative, and professional presence in order to strengthen engagement within the community and promote OHC and Oberlin as destinations.

Strategic Goals

The following pages present the top three tiers of goals set forth in the strategic plan. Additional subtasks were identified and are included in a full Strategic Plan Chart, which is available by request.

Abbreviations

The following abbreviations are used to identify which parties are responsible for leading work toward specific goals. The Oberlin Heritage Center Board and Executive Director are ultimately responsible for all goal progress.

ED=Executive Director; METC=Museum Education & Tour Coordinator; Asst=Assistant to the Director; BusMgr=Business Manager; CollMgr: Collections Manager

ExecCom= Executive Committee; CollCom=Collections Committee; DevCom=Development Committee; FinCom=Finance Committee; GovCom=Governance Committee; OralHist = Oral History Committee; WWCom= Westwood Committee; OHCP=OHC Properties; Vineway=Vineway Board of Managers
1. OHC will strengthen programming that engages the public and leads to greater community involvement with the organization.

1.1 Ensure that the educational component of OHC’s programs and activities aligns with its mission statement and values.

   1.1.1 Draft and adopt a one-page broad interpretive position statement that describes themes and direction. (2018 METC, ED)

   1.1.2 Develop a more strategic annual program calendar / series in relation to the new interpretive statement and strategic engagement goals. (Annually ED, METC)

   1.1.3 Strengthen the use of local stories to address national themes (Ongoing METC, ED, CollMgr)

   1.1.4 Incorporate more 20th century history in interpretation. See also Goal 6.1 (Ongoing METC, ED, CollMgr)

   1.1.5 Incorporate more everyday peoples' stories from throughout the community in interpretation. (Ongoing METC, ED, CollMgr)

   1.1.6 Continue living history / costumed programming as a means of meeting interpretive goals and audience preferences. (Annually METC)

   1.1.7 Adopt a cost effectiveness tracking system for educational programs and review results on a regular basis. Implement change as needed. (2018 ED, METC, Asst, BusMgr)

   1.1.8 Assess the need and feasibility for an Education/Interpretation Committee. Form as needed. (2019 METC, ED)

   1.1.9 Continue offering free educational programs to Oberlin City Schools and work strategically with teachers to develop a program/tour for a new targeted grade each year. (Annually METC)

1.2 Ensure that future OHC education programs serve new targeted audiences, such as the 20-40 age group/young professionals, underrepresented audiences, minority community members, and adult special interest groups.

   1.2.1 Implement new communication strategies to reach these audiences. Research the most effective ways to share information. See also Goal 7 (2019 Asst, METC, ED, AmeriCorps)

   1.2.2 Annually offer up to five free tours or programs to targeted local organizations or audiences, possibly in new venues. Ideally half will be directed toward key partner organizations in Oberlin. (Annually METC)

   1.2.3 Annually offer a workshop that meets interpretive goals and connects with an adult special interest group. (Annually METC, ED)

   1.2.4 Collaborate with new local partners to develop mutually-beneficial and mission-related programs or projects. See also Goals 1.4 and 7.2.2 (Ongoing METC, ED)

   1.2.5 Measure and assess these programs for impact on participants and new engagement with the Oberlin Heritage Center. See also Goal 1.1.7 (Ongoing METC, ED, Asst)
1.3 Improve access to OHC’s educational programming.

1.3.1 Implement accessibility improvements based on the 2016 Accessibility Assessment, including physical, programmatic, digital, schedule, and financial. See also Goal 3.2.1 (Ongoing METC, ED)

1.3.2 Continue to track feedback and observations regarding current accessibility. (Ongoing METC, ED)

1.4 Identify and promote platforms that enable people and organizations to share their own histories.

1.4.1 Continue working with the Coalition for Oberlin History and other groups to support community-generated history projects. (exhibits, online, etc.) (Ongoing ED, METC)

2. OHC will strengthen its financial position by creating a culture of philanthropy and enhancing its development efforts while striving toward a balanced budget.

2.1 Create a culture of fundraising that is OHC-wide.

2.1.1 Maintain the Development Committee as an ever-active, engaged group of fundraisers. (Ongoing DevCom, ED, Asst)

2.1.2 Continue to build board and staff fundraising capacity through periodic workshops and training. See also Goals 4.1 and 2.3.2.6 (Ongoing DevCom, GovCom, ED)

2.1.3 Develop a written calendar for board fundraising efforts that will be presented to prospective and current board members. (Annually DevCom, ED, Asst)

2.1.4 Seek new member suggestions from board and staff on a quarterly basis. (Quarterly ED, Asst)

2.1.5 Use board and staff input and engagement to develop a major donor program. (2018, Ongoing ED, DevCom, Asst)

2.1.6 Communicate fundraising and member cultivation successes among the board and staff. (Ongoing DevCom, ED, Asst)

2.2 Build the endowment for heritage preservation that will be used for the maintenance and preservation of OHC’s historic buildings and grounds, the care and management of the current and future collections, and the improvement and enhancement of facilities that support OHC’s mission.

2.2.1 Fund the Pat Murphy Endowment for Heritage Preservation with an ultimate goal of raising one million dollars. (Ongoing DevCom, FinCom, ED, Asst)

2.3 Increase operating revenue for long-term financial stability.

2.3.1 Increase annual fund giving to $50,000 by 2023. (2023 DevCom, FinCom, ED, Asst)

2.3.2 Increase membership revenue by reaching a sustainable 750 members. See also Goals 1 & 7 (2023 DevCom, all staff)
2.3.3 Seek sponsorships for programs with a goal of reaching $5,000 per year by 2023. (2023, Ongoing DevCom, ED)

2.3.4 Seek new sources for grant and foundation support. (Ongoing ED)

2.4 Actively promote planned giving and improve planned giving cultivation.
   2.4.1 Create a group name and organize an annual event for individuals who have included OHC in their estate plans. (2019, Ongoing DevCom, ED, Asst)
   2.4.2 Meet with individuals who received the initial planned giving brochure in 2017 and follow up with them. (2019 ED)
   2.4.3 Seek staff training specifically for growing a planned giving program. (Ongoing DevCom, ED, Asst)
   2.4.4 Include language about estate planning in OHC communications multiple times per year. (Annually DevCom, ED, Asst)

2.5 Implement programs to increase giving efficiency.
   2.5.1 Promote the credit card recurring giving program. (2018 Asst, BusMgr)
   2.5.2 Promote stock gifts and other giving alternatives. (Annually DevCom, ED, Asst, BusMgr)
   2.5.3 Streamline the online donation process. (2020 ED, Asst, BusMgr)

3. OHC will develop and implement plans to ensure that its facilities, properties and grounds support the organization’s mission and core values.
   3.1 Ensure that the physical properties and collections of OHC are regularly assessed and that maintenance and preservation issues are addressed in a timely manner and according to professional standards.
      3.1.1 Prioritize future building maintenance and preservation projects, with first priority to address deferred and ongoing maintenance needs, and a lesser priority for projects that will make cosmetic improvements that may enhance interpretation. (2019 ED, CollMgr, Consultants)
      3.1.2 Continue to refine the cyclical maintenance and preservation plan. (Ongoing ED, CollMgr)
      3.1.3 Continue to seek outside funding for large maintenance and preservation expenses. (Ongoing ED)
      3.1.4 Seek historic preservation expertise and guidance as needed on any building projects relating to the historic structures OHC owns to assure continued adherence to the Secretary of the Interior’s Standards. (Ongoing ED)

   3.2 Ensure that the facilities support the needs of the staff, visitors, collections, and the public.
      3.2.1 Improve physical accessibility to the first floor of the Jewett House. (2020 ED)
3.2.2 Identify and prioritize other facility improvement and/or addition projects. (2019 ExecCom, ED)

3.2.3 Make more effective use of the grounds and green space for wayfinding, interpretation, activities, etc. See also Goals 7.1 and 7.4.1 (2020 ED, METC)

3.3 Continue to explore options to make the buildings more energy efficient through measures which are compatible with their historic integrity.

3.3.1 Identify and implement appropriate changes, such as those of the GreenNonprofits Certification program. See also Goal 5.4 (2019 ED, BusMgr, CollMgr)

3.4 Continue to operate 81 South Professor and Vineway as well-maintained, revenue generating properties.

3.4.1 Develop a property management policy and reporting structure. (2019 ExecCom, ED, BusMgr, OHCP, Vineway)

3.4.2 Explore options to strengthen and consolidate property management of OHC's buildings and grounds as needed. (Ongoing ExecCom, ED, BusMgr, OHCP, Vineway)

3.4.3 Continue the staged rehabilitation of the Vineway building. (Ongoing Vineway, ED)

3.4.4 Develop hallway history exhibits and permanent interpretation that links Vineway to OHC. (2019 ED, METC, Vineway)

3.4.5 Develop maintenance schedules to track past and expected major expenses. (2018 ED, OHCP, Vineway)

4. OHC will maintain a strong and effective governing board that ensures institutional stability, sustainability and growth in cooperation with the Executive Director.

4.1 Strengthen the board's capacity and willingness to fundraise and to serve as OHC's good will ambassadors.

4.1.1 Budget for and provide fundraising training for board members and staff. See also Goal 2.1.3 (Annually DevCom, ED, Asst)

4.1.2 Be more formal in recruiting future board members to ensure they are willing to contribute to future fundraising efforts. (Annually GovCom)

4.1.3 Increase and evaluate board member efforts to become constant strong advocates for OHC, mindful observers of other nonprofits, and cultivators of members, volunteers, and donors. (Ongoing DevCom, ED, Asst)

4.2 Improve the new board member orientation process.

4.2.1 Make the orientation process more tailored to the existing knowledge and proficiencies of the new members. (2018 GovCom)

4.2.2 Include topical training with OHC staff: finances, membership, collections, tour. (Annually GovCom, ED)
4.2.3 Pair new board members with experienced members in a mentoring relationship. (Annually GovCom)

4.3 **Ensure progress toward strategic goals.**

4.3.1 The Executive Committee will meet periodically with the director and monitor institution-wide progress in achieving strategic plan goals. (Ongoing ExecCom, ED)

4.3.2 The Executive Director will continue the strategic plan reporting structure in the board packet. (Ongoing ED)

4.3.3 Committees will annually review progress toward relevant plan goals and tasks. (Annually Board)

4.4 **Ensure the organization’s governing documents reflect current organizational needs and best practices.**

4.4.1 Review and update the By-Laws as needed. (Last approved 2010) (2020 GovCom)

4.4.2 Review and update the Constitution as needed. (Last approved 2010) (2020 GovCom)

4.4.3 Review and approve the updated Staff Handbook. (2018 ED, BusMgr, Board)

5. **OHC will maintain strong and effective human resources (paid, volunteer, and intern) and a management structure that ensures institutional stability, sustainability and growth.**

5.1 **Ensure strong and effective staff capacity.**

5.1.1 Maintain funding for current staff positions. (Ongoing FinCom, ED, DevCom)

5.1.2 Continue to provide training and professional development for all staff and volunteers. (Ongoing ED)

5.1.3 Implement regular drills and training for staff to familiarize people with and test the emergency plan. (Ongoing ED)

5.2 **Assess current and future staffing needs and strengthen staff sustainability.**

5.2.1 Review existing succession plans and hiring guidelines. (2018 ED, ExecCom)

5.2.2 Create a succession plan for the Assistant to the Director's expected retirement. (Take into consideration her primary duties as they relate to publicity, membership, and development.) (2018 ED, ExecCom, Asst)

5.2.3 Increase staff hours as needed and allowed for in the budget to meet strategic goals and organizational needs. (Ongoing ED, ExecCom)

5.2.4 Strengthen supporting positions as is feasible through paid or volunteer assistance. (Ongoing ED, METC, BusMgr)
5.2.5 Review employee benefits and compensation and adjust as needed to remain competitive. (Ongoing ExecCom, ED, BusMgr)

5.2.6 Consider reviving the museum fellow program (a one-year entry level professional position for a recent graduate) if OHC is no longer able to participate in the AmeriCorps program. (2019 ExecCom, ED)

5.3 Ensure that OHC’s workforce (board, staff, interns, and volunteers) better reflect the diversity of the community it serves, including race, ethnicity, age, gender, economic levels, etc.

5.3.1 Incorporate this goal in all hiring and recruiting of board, staff, and volunteers. (Ongoing GovCom, ExecCom, ED)

5.3.2 Ensure that OHC programming engages diverse audiences, increasing the potential for diverse involvement at a higher level. See also Goal 1.2 (Ongoing ED, METC)

5.3.3 Continue to promote OHC programming and involvement opportunities through diverse networks. See also Goal 1.2 (Ongoing ED, Asst, BusMgr, METC)

5.4 Become a more environmentally-friendly organization.

5.4.1 Implement facility, purchasing, and administrative changes such as those identified by the GreenNonprofits Certification program. See also Goal 3.3 (2019 ED, BusMgr)

5.4.2 Begin transitioning to an integrated digital administrative calendar. (2019 METC, ED, BusMgr)

5.5 Maintain Ohio Association of Non-Profit Organizations’ Standards for Excellence certification.

5.5.1 Plan for and prepare recertification materials for submission in January 2019. (Current certification expires in 2019.) (2018 BusMgr, ED, ExecCom)

5.6 Maintain American Alliance of Museums accreditation. (Final determination in 2021)

5.6.1 Review Core Documents and prepare the Self Study. (Due Nov. 2019) (2019 ED, ExecCom)

5.6.2 Budget for the review fee and site visit costs. (2018-2020 ED, BusMgr, FinCom)

5.6.3 Arrange for site visits in 2020. (2019-2020 ED)

5.7 Ensure that OHC is prepared for digital threats and opportunities.

5.7.1 Update policies and procedures related to digital data, such as member information, data protection, online transactions, back-up systems, ransom-ware, and digital threats. (2020 ED, Asst, CollCom, ExecCom, BusMgr)
5.7.2 Develop a contact list of people and organizations that can assist with / advise on OHC technology projects. (2018 ED, CollCom)

6. OHC will maintain and improve its collections, Resource Center library, collections storage areas, digital assets, and exhibit space to enhance public access and research.

6.1 Become more strategic and proactive in pursuing de-accession and accession goals so that the collection is well equipped to tell key stories in accordance with interpretive goals, including Oberlin stories of the 20th and 21st centuries.

6.1.1 Implement pro-active collecting strategies for priorities identified in the 2016 Collections Plan. (Annually CollCom, CollMgr)

6.1.2 Build a stronger historic photograph collection by determining the legal status of photographs already in the collection. (2018 CollMgr)

6.1.3 Build the acquisition fund. (2021 DevCom, CollCom)

6.1.4 Continue to de-accession items to create more space for items that better tell Oberlin stories. (Ongoing CollCom, CollMgr)

6.2 Establish priorities for future interior projects, in conjunction with Buildings and Grounds objectives and tasks and interpretive strategy.

6.2.1 Continue to explore ways to improve and increase collections storage capacity with a focus on increasing storage in the Resource Library. See also Goal 3.2.2 (2021 CollMgr, ED)

6.2.2 Continue to enhance the authenticity of furnishings and the interpretation of interior spaces, based on research, available collections, and anticipated use in conjunction with master planning and educational goals. (Ongoing CollCom, CollMgr, METC, ED)

6.2.3 Assess and physically demarcate the Teaching Collection for easier access and implementation in hands-on tours and programs. (2019 CollMgr, METC)

6.3 Pursue conservation work on items identified in the Conservation Priority List. 

6.3.1 Consult with a conservator on the feasibility and cost of conserving identified items. (2019 CollMgr)

6.3.2 Investigate and pursue funding for targeted conservation projects. (2020 CollMgr, CollCom)

6.3.3 Carry out target conservation projects, including the Stetson Quilt. (2020, Ongoing CollMgr)
6.4 Continue work to systematically collect, organize, and transfer key paper and digital materials to the collection that document the institution's history and development.

6.4.1 Consolidate records that document physical changes to the museum and landscape. (2019 ED, BusMgr, CollMgr)

6.4.2 Identify and create a digital archive of key organizational documents. (2018 ED, BusMgr, CollMgr)

6.5 Strengthen the Oberlin Oral History Project.

6.5.1 Improve public access to and awareness of the collection. (2020, Ongoing ED, OralHist, CollMgr)

6.5.2 Improve project implementation and administration. (2018, Ongoing ED, OralHist, CollMgr)

6.6 Augment and improve access to popular resource holdings.

6.6.1 Make key areas of OHC's collections database accessible online, at least for searching. (2021 CollMgr, ED)

6.6.2 Develop a digitizing priority list and implement mini projects. (2019, Ongoing CollMgr, ED, METC)

6.6.3 Explore ways to share the genealogy database online while retaining control over the data. (2019 ED, CollMgr)

6.6.4 Consider re-instating the historic building inventory program. (2019 ED)

6.6.5 Review and improve relevant Wikipedia pages. (2019, Ongoing ED, METC)

6.7 Continue projects related to the interpretation and preservation of Westwood Cemetery.

6.7.1 Complete GPS mapping of burials as of 2020. (2020 WWCom, ED)

6.7.2 Develop an annual plan for recording new burials. (2020 WWCom, ED)

6.7.3 Explore options for public use of the GPS information and submit a report to the ED. Prioritize, seek funding, and implement. (2019 WWCom, ED)

6.7.4 Continue to collaborate with other local groups interested in the preservation and improvement of Westwood Cemetery. (Ongoing WWCom, ED)

6.7.5 Aid the City of Oberlin in the implementation of their new cemetery database as requested. (Ongoing WWCom, ED)

6.7.6 Continue to expand and improve upon educational programs involving Westwood Cemetery. (Ongoing WWCom, ED)

6.7.7 Review "Westwood: A Historical and Interpretive View of Oberlin's Cemetery" book and propose edits, revision, updates to ED. (2021 WWCom, ED)
6.8  **Plan for the long-term preservation of digitally-born resources. See also Goal 5.7**

6.8.1  Evaluate and implement best practices for the preservation and migration of digital files such as oral histories, documents, and photographs. (2020 CollMgr, CollCom, ED)

6.8.2  Evaluate and formalize OHC's use of metadata for such files. (2020 CollMgr, CollCom, ED)

7.  **OHC will continue to increase its visibility and strengthen its organizational image.**

7.1  **Create a more visible presence for the Heritage Center on Main Street.**

7.1.1  Add more interpretation within the Vineway building. See also Goal 3.4.4 (2019 ED, METC, Vineway)

7.1.2  Make wayfinding or interpretive improvements near OHC's green space on Main Street. (2020 ED, METC, Asst)

7.2  **Create more exhibits that increase community awareness of the programs and collections of OHC.**

7.2.1  Work with varied community partners to create and/or host off-site exhibits that address multiple strategic goals and intentionally direct viewers to engage with OHC in other ways. See also Goal 1.2.4 (Annually ED, CollMgr, METC, CollCom)

7.2.2  Create or co-create on-site exhibits that will strengthen community collaborations, draw new target audiences, and/or feature artifacts and histories not often interpreted. (Annually ED, CollMgr, METC, CollCom)

7.2.3  Continue to investigate and experiment with cost effective digital exhibition platforms. (2019 ED, METC, CollMgr)

7.3  **Streamline, consolidate and strengthen publicity through social media and other media to create a more coordinated and efficient public relations and community relations strategy.**

7.3.1  Strengthen the role of the Assistant to the Director as publicity coordinator. (Ongoing Asst, ED)

7.3.2  Assess analytics from the website, E-Gazette, social media, and visitor information to shape marketing efforts. (Annually Asst, METC, ED)

7.4  **Make OHC more welcoming to the public and members (especially new members).**

7.4.1  Improve on-site wayfinding and interpretation. See also Goals 3.2.3 and 7.1.2 (2019 ED, METC, Asst)

7.4.2  Train docents, volunteers, staff and board in public relations, customer service, and the importance of membership. See also Goal 2.3.2.6 (Annually ExecCom, ED, Asst, METC)
7.4.3 Continue to improve physical and online access to OHC's programs, services, and resources. See also Goals 1.2, 1.3 and 6.6 (Ongoing ED, METC)

7.4.4 Continue to assist local preservation and history initiatives led by other organizations. See also Goal 1.4.1 (Ongoing ED, CollMgr, METC)

7.5 *Increase the reputation of the Oberlin Heritage Center as a destination.*

7.5.1 Seek opportunities for cross-promotion and collaborative events with organizations serving target audiences. (Annually ED, Asst, METC)

7.5.2 Continue marketing to adult group tour organizers. See also Goal 2.3.2.4 (Annually METC)

7.5.3 Continue improving OHC's online reputation as a destination. (Ongoing METC, ED)

7.5.4 Increase distribution of the E-Gazette newsletter to new subscribers. (Ongoing Asst, ED)

7.5.5 Continue researching and publishing, online and physically, material that highlights Oberlin's nationally significant history. (Ongoing ED, METC)

7.5.6 Formally invite government representatives to OHC and special events. (Annually ED)

7.5.7 Consider participation in a tour industry conference / trade show. (2019 ED, METC)

7.5.8 Create an annual OHC signature event that draws a target audience to OHC's physical location. (2019 ED, METC, Asst, DevCom)

7.5.9 Develop take-away materials that include history information and encourage people to spread the word and return to Oberlin. (2019 ED, METC, BusMgr, Asst)
Overview of the Planning Process

The strategic planning process began in September 2017 with the formation of a planning committee consisting of trustee and Committee Chair Claudia Jones, trustees Camille Hamlin Allen, Dick Baznik, Ken Grossi, Marly Merrill, Brittnei Sherrod, Ed Wardwell, and Gail Wood, as well as Executive Director Liz Schultz. That fall the Strategic Plan Committee instructed board committees, advisory committees, the subsidiary boards, and OHC staff to review the existing plan, evaluate progress, and begin formulating recommendations for a new plan.

The committee also discussed the nature of the plan and strategies for involving broad representation of the Oberlin community and OHC constituents in the planning process. They agreed that because the formulation of goals for the 2015-2018 plan had been thorough and no new significant challenges or opportunities were expected, the seven goal framework of the existing plan could be carried into the new plan. The strategic planning process would focus on seeking public feedback and involvement, evaluating plan progress and organizational needs to prioritize existing and newly identified goals, and defining more subgoals to give direction to progress over the course of the new five-year plan.

The committee recommended the hiring of Leslie Yerkes of Catalyst Consulting to provide feedback on the intended planning process, to moderate three public meetings, and to moderate a combined board and staff retreat. In consultation with the committee, Leslie structured the three public meetings around an appreciative inquiry framework. This would hone in on the strengths of the Heritage Center, with the idea that building from those would help the organization achieve strategic goals and be better prepared to weather future challenges.

The following were the three scheduled public meetings:

- January 15, Kendal at Oberlin 4:00-5:15 p.m. – 36 participants
- January 18, House of Zion Fellowship Hall, 5:30-6:45 – 35 participants
- January 20, Oberlin Public Library, 2:00-3:15 – 34 participants

In all, 96 individuals participated in the meetings and, including follow up surveys, 100 responses were compiled. In addition to publicizing in the newspaper, e-newsletter, calendar, and website, invitations were emailed to over 975 email addresses. While there was diversity in regards to age, race, occupation, and Oberlin affiliation, the committee would have liked to see more representation from the Oberlin City Schools, churches, persons under 30, and non-members.

At the public meetings, participants were asked to pair up with someone they did not know very well and ask each other five questions while taking notes. In summary, the questions focused on 1) A positive experience they’d had with OHC 2) the mission of OHC 3) History-based programs they like 4) Suggestions for OHC's future and 5) Their involvement with OHC. Another question asked how they prefer to learn about upcoming events.

Claudia Jones and Gail Wood typed all of the responses and Liz Schultz created a document that attempted to thematically summarize the results. During this time the committee was actively updating the plan based on feedback from the various organizational committees, staff, and feedback discussions.

On March 7, 2018 the board of trustees and staff gathered from 5:30 p.m. to 7:30 p.m. at the Oberlin Depot to discuss the strategic plan. Leslie Yerkes summarized what she heard during the public meetings and then broke everyone into smaller groups to compare the resulting feedback to...
the draft strategic plan. Notes were taken and additional edits made to the draft plan. The committee reviewed comments relating to the mission statement and recommended keeping the mission as is and working those concerns into a new Vision Statement. The committee also reviewed and edited the Core Values, and other sections of this document. Staff members made final recommendation for the years in which tasks were to be completed. The committee reviewed the final draft of the plan and this summarizing document on April 26 and recommended them for approval at the board meeting of May 2, 2018.

Summary of the History of the Oberlin Heritage Center

The Oberlin Heritage Center originated in 1903 as a part of the Progressive-era "improvement" movement when a group of citizens founded the Oberlin Improvement Society (later known as the Oberlin Village Improvement Society), which advocated for improved public hygiene and social and municipal services, and helped to create Oberlin’s park system. In 1958, a separate Oberlin Historical Society organized and began acquiring historic buildings and artifacts. In 1964, the Oberlin Historical Society and the Oberlin Village Improvement Society merged to become the Oberlin Historical and Improvement Organization (O.H.I.O.).

In the early 1990s, O.H.I.O. began its transformation from a small, all-volunteer group to a professional museum and historical organization, hiring an Executive Director in 1993 and a Museum Education and Tour Coordinator in 2007. In the mid 1990s, OHC began systematically collecting historically significant artifacts and archives, and began an active program of tours and presentations about Oberlin's history. In 1998, the organization named its complex of historic buildings "The Oberlin Heritage Center."

Today the Oberlin Heritage Center is open to the public for tours year-round. The OHC complex includes: the Monroe House (moved in 1960), the Little Red Schoolhouse (moved next to the Monroe House in 1968 and moved to its present site in 1997), and the Jewett House and its barn (in their original locations, added to the site in 1966). The organization offers public and school programs and special events throughout the year and issues periodic publications on historical topics. Major projects include the Westwood Cemetery Inventory and the Oberlin Oral History Project. OHC recognizes that there are many histories in the Oberlin community and is active in preserving and interpreting this unique heritage, including Oberlin's founding as a Christian colony, historic and ongoing struggles for racial and gender equality, Oberlin's continued but shifting commitment to progressive movements, and the discovery of a practical method of refining aluminum. The Heritage Center is actively strengthening its collecting and interpretation of 20th and 21st century histories, events, organizations, and individuals.

OHC is part of the Time Travelers’ network of historical organizations and of the National Trust for Historic Preservation’s Statewide and Local Partners Network. It is a designated facility of the National Park Service’s Underground Railroad Network to Freedom program. In 2005, OHC earned national recognition with its accreditation by the American Association of Museums (now the American Alliance of Museums).

OHC (and its predecessors) have a long history of community involvement, including managing the former Oberlin Community Center Building, preserving and finding a use for the Burrell-King House (now the Community Music School), guiding the replacement of the historic tower of the New Union Center for the Arts, and restoring the historic exterior of the Vineway building. OHC has been active in securing historic site designations and historical markers and in preserving historical buildings in the community.