

**Step 1: What are our organization’s MISSION & VISION?**

MISSION	VISION
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**Step 2: How can our organization be part of the Oregon Heritage Plan?**

Goal 1: Include More Voices	Goal 2: Increase Access to Heritage
Goal 3: Promote the Value of Heritage	Goal 4: Pursue Best Practices

**Step 3: What does success look like in 5 years?**

A. Imagine someone is making a documentary about your organization to highlight how incredibly successful you have been at reaching your mission. What does the scene look like where they are showcasing your success? Make sure to include...

- Where does the scene take place and what does it look like?
- Who is there?
- What are people doing?
- What feelings do people express and how?

A large, empty rectangular box with a thin black border, intended for a drawing or written response to the prompt above.

B. Based on this vision, write down a few key goals you would like to work towards:

**Step 4: What are the obstacles between you and your goals?**

Create a list of obstacles for each of your goals. Examples might include lack of money, limited staff time, lack of relationships with your desired audiences, distrust between partners, etc.

### **Step 5: What resources do you have to help you?**

Create a list of tangible and intangible assets you can use to realize your vision.

*Tangible* assets include things like collections, buildings, employee time, etc.

*Intangible* assets can include volunteers/staff with special skills, public interest, champions in local leadership, Elders with deep knowledge of the local history and culture, a scrappy attitude, etc.

**Step 6: Using your assets, what actions can you take to overcome the obstacles and move towards our vision?**

A. Identify actions you can take to address each of the obstacles blocking your goals.

B. Once you have a list of things you could do, rearrange them in time and priority order. What should happen now, in the near future, and in the distant future.

**Step 7: How can we break each action into achievable tasks?**

Break each big picture action into a set of SMART tasks or objectives. SMART stands for Specific, Measurable, Achievable, Relevant, and Time-Bound.

**Step 8: Who will be responsible for each objective?**

Identify who is responsible for the work, who will help them, who they need to consult at key times, and who needs to be informed along the way.

Who will...

Lead	Help	Consult	Be Informed

## Next Steps...

### Contact us!

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### Check out these Resources

Oregon Heritage Engagement Tools

(<https://www.oregon.gov/opr/OH/Pages/tools.aspx>)

Xplane planning activities and worksheets (<https://xplane.com/worksheets/>)

Technology of Participation courses in facilitating planning processes

(<https://www.top-training.net/w/>)

American Alliance for Museums Museum Assessment Program (MAP)

(<https://www.aam-us.org/programs/accreditation-excellence-programs/museum-assessment-program-map/>)

American Association for State and Local History professional development  
programs (<https://aaslh.org/professional-development/>)

Oregon Main Street Strategic Planning Guidebook

(<https://www.oregon.gov/opr/OH/Documents/Developing%20a%20Strategic%20Plan%20Workbook.pdf>)

Oregon Main Street Workplan Template

(<https://www.oregon.gov/opr/OH/Documents/Main%20Street%20work%20plan%20templates.xlsx>)

Oregon Main Street Project Prioritization Template

(<https://www.oregon.gov/opr/OH/Documents/TEMPLATE%20-%20Project%20Rubic%20%26%20Prioritization.xlsx>)

### Try something and reach out to your colleagues

Write at least one thing from this workshop that you would like to try.

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Write the name and contact information for at least one person in the group that you want to follow up with for collaboration or continued learning.

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