Boston Athenæum Annual Report on the Operational Plan, 2015-2018

In July 2015, the Board of Trustees approved a three-year operational plan, developed over the preceding six months through a broadly consultative process involving members, shareholders, employees, regional peers, and prospective members.

The plan set goals across a range of areas, designed not only to position the Athenæum for near-term success but also to lay the groundwork for the next strategic plan. In the months that followed, area managers have overseen the timely sequence of actions required to accomplish each goal. To date, every milestone has been met on or ahead of schedule.

In the text that follows, passages in italics are taken from the operational plan. The full text of the operational plan and a preliminary report on the planning process are available on the Athenæum’s website, where this, and subsequent annual progress reports, will also appear.

Elizabeth E. Barker, Ph.D., Stanford Calderwood Director, January 2017

A. MEMBER, READER, AND PUBLIC SERVICES

I. Technology

→ From October 2015 to January 2017, the Athenæum will undertake a comprehensive technology audit, to include a peer review process and to culminate with a technology plan for review by the board.

Immediate:

- Prepare a comprehensive technology self-assessment, providing detailed documentation of correct policies, procedures, equipment, staffing, and services, and including the results of a future-needs survey (completed in winter 2015-16)

Within one year:

- Present self-assessment to external visiting committee (completed in spring 2016)
- Conduct peer-review site visit (accomplished in spring 2016)
- Review external report outlining opportunities for near-term efficiencies and long-range opportunities for excellence (completed in summer 2016)
- Develop, for board review, a five-year prioritized plan for enacting the report’s goals (completed in summer 2016)
- Launch an automated notification system for event cancellations, etc. (accomplished)
• Review hardware inventory (accomplished)

Within two years:
• Introduce federated searching across the various electronic catalogs for books, art, and digitized materials (under research)
• Implement a new phone system (in progress)
• Attain cyber security certification (in progress)
• Review digital preservation platforms and methodologies (in progress)
• Review financial management software (forthcoming)
• Review membership management software (forthcoming)

Within three years:
• Review collections management software (forthcoming)

Four-five years:
• Undertake systems migrations to software as selected above (forthcoming)

II. Educational Programs

→ In April 2015, the Athenæum established a department of education, charged with developing, overseeing, and assessing programs linked meaningfully to the Athenæum’s collections and related research; working with the volunteer docents; and cultivating relationships with peer institutions.

Immediate:

• Establish an education department charged with linking the mission of the organization to the needs of members voiced during the planning process (completed in spring 2015, with seed funding from a group of Trustees)
• Ensure the development of member and public programs linked meaningfully to the Athenæum’s collections and related research (ongoing)
• Organize, train, deploy more broadly, and increase the corps of volunteer docents (launched in fall 2015 with an expanded docent training program; the expansion of docent-led public building tours and introduction of foreign language tours; and the introduction of docent-led exhibition tours; ongoing)
• Help to shape, coordinate the Athenæum’s educational communications (ongoing)
• Cultivate strategic partnerships with regional cultural institutions (launched in summer 2015 and actively ongoing)

Within one year:

• Develop and implement ongoing methods of assessment of the Athenæum’s educational activities (in progress)
• Craft an overarching educational program for the Athenæum’s college interns (in progress)

III. Communications
→ From April 2015 to June 2017, the Athenæum’s incoming director of communications will lead a concerted effort to heighten institutional visibility and bring ever greater consistency and clarity to the Athenæum’s public communications.
Immediate:
• Undertake external audit of all published communications (completed in spring 2015)
• Identify opportunities to consolidate, clarify, and centralize the form and style of those communications (completed in summer 2015)
• Develop templates for standard print and online materials (begun in summer 2015 and ongoing)
• Refine internal procedures and editorial guidelines for published texts (begun in spring 2015 and ongoing)
• Hire full-time director of communications charged with preparing and coordinating, centrally, all Athenæum public communications, in print and online (accomplished in summer 2015)
• Create a single newsletter, consistent in print and electronic form, providing information about events, library news, and member activities (launched in fall 2015)

Within one year:
• Use website, social media (Facebook, Instagram, Twitter, Goodreads) to improve communication to/among members (ongoing)

IV. Members’ Experience
→ Beginning in September 2015, the Athenæum will embark on a major initiative to deepen members’ engagement. This work will include devising a membership pledge articulating core values; strengthening the new member orientation programs; expanding services; improving cross-catalogue discovery tools; addressing the shortcomings of our lecture space; attending to readers’ needs; and strengthening the sense of community among Proprietors.
Immediate:
• Ensure that trained library employees are available to meet readers’ needs whenever the Athenæum is open (ongoing, added additional reference librarian position in fall 2015)
• Provide members’ computers in more locations (launched in spring 2016)
• Promote free scanning as alternative to pay-as-you-go printing (accomplished in spring 2016)
• Publish the catalogue of paintings and sculpture online (accomplished in winter 2016)
• Increase promotion of reader services, including by providing more information at new member orientation programs (ongoing)
• Broaden opportunities for Proprietors’ engagement beyond the annual meeting by introducing brief, substantive presentations at receptions held at other times of year (ongoing)
• Support members’ use of electronic communication to strengthen sense of community
  (ongoing, including launch of Goodreads initiative in summer 2015)
• Regularize the annual open house (accomplished)
• Improve the experience of visitors to attract new members (in progress)

Within two years:

• Increase wayfinding, book-locating, and art-identifying signage (in progress)
• Improve the comfort of lecture seating (new chairs ordered in fall 2016)
• Improve lecture acoustics (implemented use of presenter-worn headset microphones in fall 2015)
• Explore expansion of membership payment options (ongoing, introduced “text2give” in fall 2016)
• Enhance/increase reader seating (in progress)
• Test alternative discussion group meeting spaces with better acoustics, more seating, optional catering (Union Club pilot project launched in fall 2016)

Alteration:

Upon further consideration, the staff decided not to pursue the development of a membership pledge, but to use other means to strengthen members’ commitment to the Athenæum.

V. Collections

→ Between August 2015 and March 2017, the Athenæum will formalize its special collections plan, review circulating collections practices, craft a collections digitization policy, and develop a conservation plan.

Immediate:

• Embark on comprehensive staff reviews of the Athenæum’s holdings, and of the policies and plans governing the development of the special collections (archives, decorative arts, drawings, paintings, photographs, prints, manuscripts, maps, rare books, and sculpture) and the circulating and reference collection (completed in 2016)

Within two years:

• Review the collection development policy for the circulating and reference collection (in progress)
• Develop strategy for born-digital materials (in progress)
• Assess near and long-term storage needs (completed, summer 2016)
• Review policies for the development and stewardship of the special collections (completed in fall 2016)
• Assess strategic priorities for special collections growth (in progress)
• Identify and attract target users of the special collections (in progress)
• Define exhibition strategy (in progress)
• Review off-site storage policy (completed in fall 2016)
• Develop a digitization policy articulating program goals, criteria for digitization, prioritized areas for digitization, preservation standards, and optimal workflows (in progress)
• Develop a conservation plan outlining policies and practices, and articulating rubrics for assessing treatment projects (in progress)

B. ADMINISTRATION, FACILITY, AND FINANCE

I. Security

→ Between April 2015 and July 2016, the Athenæum will be undertaking an external review and assessment of its security program.

Immediate:

• Assemble security training policies and procedures for review (completed in fall-winter 2015-16)
• Schedule external security review (completed in spring 2016)

Within one year:

• Undertake a comprehensive external security audit (completed in summer 2016)

Within two years:

• Implement the security audit recommendations: separate entrance from egress points (forthcoming)
• Distinguish security functions from patron services activities (forthcoming)
• Tighten access control (in progress)
• Tighten parcel control (in progress)
• Strengthen security training (in progress)
• Ensure full security staffing (ongoing)

II. Facility

→ From July 2015 to September 2017, the Athenæum will pursue its current facilities projects, update the 2010 building audit, and develop a plan for exterior improvements and repairs. From July 2016 to September 2017, the Athenæum will develop a conceptual plan for future facility needs.

Immediate:

• Install lockers in vestibule (completed in winter 2016)
• Refresh interior paint (ongoing)
• Introduce gallery-level reader seating (installed in fall 2015)
• Increase designated spaces for cell phone use (installed in fall 2015)
Within one year:

- Assess and improve configuration of circulation and security desks (ongoing)
- Update 2010 building audit with 20-year projection of maintenance, repair, and replacement projects and related costs (completed in summer 2016, reviewed by board in fall 2016, funded through establishment of board-designated fund in winter 2016)
- Engage consultants to define the Athenæum’s current and projected space program—i.e., the types, characteristics, and amounts of space used and needed to provide various services (completed in fall 2016)

Within two years:

- Embark on exterior projects, including repointing of stone and brickwork (under review)
- Repair of copper gutters (under review)
- Restoration of cast iron sand-coated balustrade (forthcoming)
- Complete ongoing grant-funded assessment of climate control systems (scheduled to conclude in summer 2017) and develop plans to address results (forthcoming)
- Explore potential improvements to the current space plan—i.e., opportunities to address crowded reading spaces, insufficient meeting areas, and ongoing collection storage challenges through adjustments to the location of certain offices and functions (in progress)

Within three years:

- Explore exterior improvements, including:
  - Handicap-accessible automatic door opening system (in progress)
  - Refining the façade lighting (ongoing)
  - Improving exterior signage (forthcoming)
  - Beautifying the terraces and piazza (in progress)
- Develop actionable plans to expand reader seating and improve meeting and activity spaces, and address ongoing collections access and storage needs (forthcoming)

III. Staffing

→ From May 2015 to June 2016, the Athenæum will prepare a staffing plan, address personnel policies, and attend to succession planning.

Immediate:

- Undertake a comprehensive external assessment of compensation and benefits, and make appropriate adjustments if/as needed (completed in spring 2015)
- Review and update the employee handbook (revised in fall 2016)
- Expand staff development training (ongoing)
- Assess the performance review program (revised in summer 2016)

Within two years:
• Develop a succession plan (in progress)

IV. Revenue

→ From September 2015 to September 2016, the Athenæum will review membership, event and rental pricing.

Immediate:

• Communicate financial position more clearly to members (ongoing)
• Develop a long-range aspirational budget (developed in spring 2016)

Within one year:

• Identify and test opportunities to diversify and increase sources of revenue (8 initiatives launched in fiscal year 2016-17)

Within three years:

• Explore opportunities to implement a fundraising campaign to support a new strategic plan (forthcoming)