

## *Report of the Council*

OCTOBER 16, 1995

AT THEIR QUARTERLY meeting this afternoon, AAS councilors devoted themselves to a careful examination of the audited financial report of the Society for the year that ended just six weeks ago. As you have heard from our Treasurer, the numbers that we saw were very encouraging: gifts and contributions are up (for which we are most grateful indeed to the Society's many donors); income earned on products and services has increased by one-third over last year's strong levels; the gain in value of our investments over the course of the year exceeded twelve percent (and that is net of the income those investments produced); while over on the expense side of the ledger, operating costs increased by only six percent, even in the face of continued expansion of our activities and services. Thus—with considerable help from our supporters and great forbearance by our dedicated and enterprising staff—the American Antiquarian Society has yet again sailed a year-long course managing to avoid the shoals of deficit spending.

Do not mistake my reiteration of these figures, however, as a call to complacency (on your part or mine) or as an assertion that our institutional success should be measured by our bottom line alone. The picture of an institution painted by its annual financial report is little more than a snapshot. Each year the work of the accountants and auditors gives us an accurate measurement of where we are monetarily, providing for us reliable annual benchmarks which, when plotted on a graph, trace the course of an institution's progress or decline. The graphs show us something of where we have been and help us understand—at least in part—where we are now. They cannot, of course, predict with certainty where we will be in the future.

Nor can we—at least not without a rigorous, farsighted, and

ongoing process of institutional planning. Each April and October I come before you on behalf of the Council to report on the plans and accomplishments of the Society. But as optimistic as I am about the directions in which we are currently moving, I cannot in all honesty say that we are currently operating under an official plan. The challenge of effective planning, I believe, stems from the need for individuals closely involved in the day-to-day running of an institution and deeply committed to its mission and programs to somehow gain the perspective of one who stands on the outside of the organization and looks in, perhaps as a supporter or a potential benefactor, as a client or a critic, as a competitor or even as one who has yet to discover the place. Compounding this challenge is the necessity that we consider and even anticipate changes in the economic, political, educational, technological, and cultural environment in which we will operate in the future. Success in planning for an organization like AAS, therefore, is dependent upon a strong working relationship between the professional staff of the institution on the one hand, and members of the governing board on the other. Representative of our diverse constituency, it is the AAS councillors who can bring to the planning process not only the 'outside in' viewpoint, but also relevant insights into the future that may lie before us, insights they have gained in their worlds of publishing, technology, education, law, public policy, business, philanthropy, and so on. It is, therefore, with great pleasure that I report that at their meeting today members of the AAS Council committed themselves to working actively with staff in a formal planning process, a long-range effort that will largely shape the directions the Society takes as it closes in on the end of its second century of operation.

Since the day of its founding, this Society has been dedicated to the systematic collection and preservation of our nation's printed archive, not as a mere vestige of the past but as a vital resource to be made generously accessible to present and future generations. To ensure our continued success, therefore, it is incumbent upon us to anticipate—to the best of our ability—the needs of those fu-

ture generations and to develop our institutional capacity to meet their expectations. I insert that phrase, 'to the best of our ability,' recognizing the great difficulty we face in predicting the future profile of a society increasingly shaped by technological innovation. Exact projections as to what will be possible or expected twenty-five or fifty years from now, for instance, are likely to have as much validity as the 1850 prediction that by 1950 New York City would be buried under sixteen feet of horse manure.

Obviously, some long-range planning exercises are more valuable than others. All too often, I fear, great effort is expended in the drafting of an ambitious agenda for the future, only to have the document, neatly printed and bound, languish on a shelf for lack of the leadership or consensus required to see it through to implementation. At the other extreme, one sees plans billed as 'long-range' or 'strategic' that represent little more than an elaborate restatement of the status quo, altogether avoiding honest assessment of the challenges that face the institution. Some pragmatic administrators think that an institutional plan should be chiefly a fund-raising schedule, while others believe strongly that the development department's agenda should follow from the plan rather than set it. One institution might choose a planning process that establishes a timetable of specific, quantifiable goals to be met. Another will opt for a planning strategy that effects changes within the culture and structure of the organization itself in order to facilitate among staff and board a process of continuous improvement and renewal from within. Some find the process of working up a plan as a collective activity among many participants to be most worthwhile; others employ outside experts to great advantage. All approaches to effective planning, however, share at least one trait: they take time—time to identify and consider all the issues; time to develop a mutual understanding of the possibilities and challenges the future holds; time to articulate clearly a vision for the institution and to map out an effective strategy for making that vision a reality. Today's decision by councillors to dedicate their resources and time to a long-range plan-

ning effort for AAS is therefore welcomed by our staff as a significant beginning, although our discussions today could only begin to explore the structure and timetable the process might require.

In my estimation, a good plan is one that operates simultaneously on many levels. On one lofty plane, it dares to dream what the institution can become some ten or twenty years in the future. On another, it can serve as a communal roadmap to be consulted by each and every person involved as they go about workaday tasks of making decisions, setting priorities, and allocating resources—a map that can be whipped out whenever we feel the need to remind ourselves just where it was we thought we were heading anyway. On both of those levels, a well-crafted plan can empower each of us to contribute significantly to shaping and attaining that common vision.

In surveying the history of the Society and studying how it has successfully adapted itself over time—which will likely be an important step in our planning process—it is our good fortune to have a rich archival record of the deliberations of councillors and staff. We can read what they were saying, at least in public, about the challenges they faced. And since many of the challenges faced by an organization such as AAS have remained immutable—such as how to reach a national constituency from but a single geographic locale, or how to make materials readily available for study while still preserving them—reading in the archive can prove alternately instructive and depressingly repetitious. And so I cannot help but wonder how our 1995-vintage perceptions of AAS and our visions of its future will strike those who find them in the archives, perhaps on the occasion of the Society's 200th birthday in 2012? I only hope that if I look back at my own personal prognostications I will not be so embarrassed as to find myself buried under sixteen feet of misdiagnosis.

So now you have something of the context in which I present this report of recent activities. Like the auditors' report we received today, this narrative will be only a snapshot of where the Society is at this time. Laid end-to-end with the snapshots pre-

sented in previous years, however, a panorama emerges of an institution in transition. Over the past three years we have begun to experiment with ways in which the Society might begin to effectively serve, and in time be supported by, a broader constituency. Mindful of the risks an institution runs if ever it loses sight of its basic mission, we have invested our energies in initiatives that we see as strengthening our role as a national research library rather than detracting from it.

For instance, we have taken our traditional program of fellowships—which bring promising researchers to Worcester for a month or more to work in the library's collections and to participate in the community of learning that flourishes here at the Society—and we expanded it to include not only classroom teachers from elementary and secondary schools, but also writers, playwrights, poets, filmmakers, journalists, and others whose exploration of historical sources here will inspire and inform works intended for a general audience. Working with these new fellows, many of whom had no prior experience in libraries of primary source materials, has given our staff an important opportunity to view our long-standing policies and procedures through the eyes of others. As a result, we are now beginning to see ways in which to improve our orientation procedures, to facilitate the use of our catalogues, and to further enhance the positive experience of using the AAS library for all readers.

AAS can now be reached via the Internet. Every day—and night—people from around the world make the electronic connection from their computers to ours, downloading information about our programs, searching our on-line catalogue, requesting information about our services, and corresponding with our staff. As pleased as we are with our initial excursion into cyberspace, it is already begging the question of our completing the detailed cataloguing of our collections and providing access to the contents of the books themselves over the network. While AAS was once considered at the forefront among special collections libraries in the use of computers, the pace with which electronic

technology has advanced has been astonishing, and we are left now rethinking the strategies we might best employ to meet rising expectations.

And to cite but a third example of our recent experiments in serving a broader audience, I turn your attention to *The History Show*. We are producing—in the style of a variety show from the early days of radio—programs that bring to life individual years in American history through the actual music, jokes, stories, and significant events of the period. Our presentation of the year 1857 was enthusiastically received by adults and school children alike. A young person who attended one of the live taping sessions wrote on the evaluation form, ‘Excellent underlined and with an exclamation point. I was expecting it to be boring and it wasn’t at all! It was very exciting even for a 16 year old who doesn’t like history that much.’ I think public radio is a marvelous medium for our message: it allows us to broadcast history, faithfully as it was written in letters, newspapers, magazines, speeches, and journals, in a lively theater-of-the-mind format, to a nationwide audience predisposed to our interests. And it proves to be a sound investment when costs are compared to potential benefit.

And these three examples only begin to hint at the ‘experimentation’ we have been conducting in our efforts to reach a broader audience. In the past six months alone we have expanded our summer seminar offerings, secured a plan to market our publications more effectively, launched a new adult study course, begun planning for another teachers’ institute to promote use of primary materials in the classroom, and presented a successful music series, including our first outdoor concert. Many of these experiments are funded as part of a generous grant from the Lila Wallace–Reader’s Digest Fund. As we begin our long-range planning work, we must honestly assess which of these initiatives we want to continue, and then we must secure the resources to do so. The Wallace grant has also provided much of the wherewithal for our recent work at making Antiquarian Hall more welcoming and useful by providing for handicapped access, transforming the

lobby and exhibit room into an attractive orientation area, improving facilities for microfilm and computer use, and enhancing our sound and visual systems.

Behind the scenes we have also been at work to prepare for the future. We have been electing to membership in the Society outstanding individuals who bring not only honor to our ranks, but also a strong commitment to serving and supporting the organization. We have worked to make certain that the Council remains truly representative of our diverse constituency. We have restructured our staff in ways that underscore our continuing commitment to services for readers. We have maintained our efforts to assiduously build and preserve our collections. We have secured from the National Endowment for the Humanities—an agency now under acute threat of extinction—funds sufficient to carry our fellowship program and our major cataloguing projects forward for the next few years, thus buying ourselves the time necessary to secure alternative funding. And, finally, we have taken the steps necessary—in our spending and investing policies—to see that our endowment continues to expand and keep pace with the demands our growing organization places upon it.

I promised you a snapshot, and yet I fear that in my attempt to cover so many activities in such a short time I have delivered little more than a blurred image. As the image of a strong institution in transition, busily preparing itself for the future, and eager to embrace the challenges and opportunities the new century may hold in store, perhaps it is the most appropriate kind of picture I can leave with you—along with my continued thanks for your interest and support.

Ellen S. Dunlap

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