



The Morgan Library & Museum

Strategic Plan 2024 - 2029

04/29/2024

Team # 06

Kayla Favaloro

Lucy Casey

Rachel Eastin

Miriam Ellis

Xi Guo

Executive Summary

The Morgan Library & Museum is responsible for an extraordinary collection of over three hundred thousand works of artistic, historical, and cultural significance. In accordance with its mission and values of honoring, celebrating, and ultimately sharing these meaningful expressions of human creativity, the Morgan will approach its next stage with commitment to leverage its resources, including a strong financial position and community and donor support, to improve the experience of its visitors, preserve these treasures for posterity, and increase the diversity and accessibility of exhibits for the appreciation and education of viewers both locally and globally. Furthermore, The Morgan is dedicated to fulfilling these goals with honest acknowledgement of its past through provenance research to ensure ethical acquisition of our artifacts.

Organization Description

Location

The Morgan Library & Museum is a three-storied library and museum with a garden court located in New York, NY near historic landmarks like the Empire State Building, Grand Central Terminal, and the New York Public Library.

The lower level of the Morgan boasts the Goldsmith Education Center, Gilder Lehrman Hall, and the Lower-Level Gallery. The main level hosts most exhibits including the Historic Library, the Clare Eddy Thaw Gallery, and the Morgan Stanley Galleries (East & West). The Second Floor showcases the Engelhard Gallery, doubling exhibition space.

Throughout the years, neighboring properties were renovated and added onto the Morgan. Starting in 1928, the Annex building replaced Mr. Morgan's residence on Madison Ave and 36th Street. Next, Jack Morgan's residence, the Morgan House, was added to the Library in 1988. In 2006, an additional 75,000 square foot exhibition space, designed by Renzo Piano, allowed the addition of amenities, including a performance hall, café, the award-winning Morgan Shop, and collections storage. Piano's design incorporated all three historical buildings with a central court connecting the buildings. The Morgan Garden restoration was designed by Todd Longstaffe-Gowan and inspired by Morgan's love for anything European. Several antiquities from Morgan's collection are on display throughout the garden. The garden surrounds the Morgan and is seasonally open to the public to enjoy.

Context and purpose

The Morgan is a global institution housing rare books, providing scholarly research opportunities, and offering various programs for patrons. Since its official launch as a public institution in 1924, the Morgan has developed several institutional values that shape the unique space. The values encompass ideals such as scholarship and learning, imagination and creativity, and access and transparency. The Morgan ideals focus not only on staff facilitated programs based on their own original research, but also strives to provide a space that diverse audiences can find themselves in.

The Morgan is dedicated to providing researchers opportunities to access rare material from its collections to continue their own projects. Also, its digital archives are continuously growing, which means researchers across the globe are able to access books, artwork, and other items from the Morgan collections to aid in valuable research without having to make a trip to New York City. As part of its values, the Morgan provides various programs that showcase the collections in another light. From concerts to family programs, the Morgan focuses on maintaining a space that many can interact with and learn from.

General history

Financier, collector, and cultural benefactor Pierpont Morgan's personal library was built between 1902 and 1906 adjacent to his New York residence at Madison Avenue and 36th Street. It began as an Italian Renaissance-style palazzo designed by Charles Follen McKim before expanding to its present form, half a city block.

In 1924, eleven years after Mr. Morgan's death, his son J. P. Morgan, Jr. (1867–1943), known as Jack, made the library and its treasures available to scholars and the public by transforming it into a public institution.

Belle da Costa Greene (1879–1950) ran the Morgan Library for forty-three years, first as the private librarian of Mr. Morgan, then to his son, Jack, and later as the inaugural director of the Pierpont Morgan Library (now the Morgan Library & Museum). Having been born to Black parents, Greene spent her professional career passing for white in a segregated and deeply racist society. Greene built one of the most important collections of rare books and manuscripts in the United States, in addition to promoting the work of women scholars and librarians, and transformed an exclusive private collection into a major public resource with exhibitions, lectures, publications, and research services that continues today.

Through purchases and generous gifts from donors, the Morgan has continued to acquire rare materials, as well as important music manuscripts, early children's books, Americana, and materials from the twentieth century.

Management and leadership structure

The Morgan is presided over by a board of trustees. Per their form 990 filed with the IRS (2022), the overwhelming majority of the board members are independent from day to day operation of the organization, indicating that leadership is more likely to be unbiased and able to focus on fulfilling the mission statement of the organization rather than personal benefit or maximizing profit performance. Administration of the library and museum is handled by designated directors. Further management is then delegated to specialized department heads and curators.

Brief description of parent organization

The Morgan is an independently operated non-profit 501(c)(3) charitable organization without any parent organization. In the past ten years, the Morgan has been majorly funded by numerous donors, patrons, corporate, and private foundations. The Morgan has also collaborated with the New York City Department of Cultural Affairs (2020).

How Funded

The Morgan is funded through membership fees in addition to various donations collected through a variety of programs open to Morgan patrons. Small amounts of donations and art work have been made by private donors. Furthermore, grants are periodically secured through collaborations with corporate and private foundations, facilitated by grant proposal submissions. These approaches ensure a steady influx of support, enabling the Morgan to pursue their mission excellently.

Partners and collaborators

Partner: [White & Case LLP](#) | Leader: [Apple TV+](#), [Davis Polk & Wardwell LLP](#), [HBO](#), [JPMorgan Chase & Co.](#), [Morgan Stanley](#), [Sciame Construction](#) | Sponsor: [World50](#), [Bloomberg Philanthropies](#), [Paul, Weiss, Rifkind, Wharton & Garrison LLP](#) | Patron: [Con Edison](#), [Corning Incorporated Foundation](#), [GoodMart](#), [The Charles A. Dana Foundation](#), [Van Cleef & Arpels](#) | Donor: [Angelo Gordon](#), [Christie's](#), [Goldman Sachs & Co.](#), [Penguin Random House](#), [Sotheby's](#)

A Community Institution, Serving New York City

The Morgan independently serves New York City as a museum and research library. Since 2020, the Morgan has committed to diversify audiences to incorporate marginalized communities into regular programming; noting that women, artists, writers, and scholars of color are to be highlighted through educational and public programs, social media influence, blog posts, and videos. Library programs are presented in a variety of languages to compliment the diverse backgrounds of patrons, in addition to a complimentary broad

translation program that continues to build multilingual resources within the Morgan. The 2022-23 academic year focused on in-person and online initiatives focused towards teens from underrepresented backgrounds and strived to diversify engagement with college students. The Morgan is committed to building community efforts from within the organization by taking part in anti-racist training.

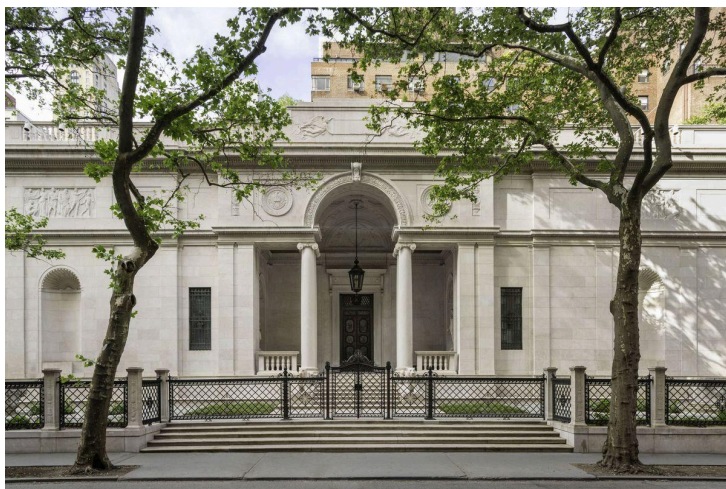
Photos

Figure 1 *J. Pierpont Morgan's Library*



Note. From *The Morgan Library & Museum* [Watercolor], by H. Hawley, 1902, (<https://www.themorgan.org/exhibitions/online/bookmans-paradise/vision-morgans-library>).

Figure 2 *The Morgan Garden*



Note. From *The Morgan Library & Museum* [Photograph of garden], by B. Beyer, (n.d.), (<https://www.themorgan.org/visit/garden>).

Figure 3 *Belle da Costa Greene*



Note. From *The Morgan Library & Museum Archives* [Gelatin silver print], by E.W. Hirsted, 1910, (<https://www.themorgan.org/exhibitions/online/bookmans-paradise/belle-da-costa-greene-1910>).

Figure 4 *J. Pierpont Morgan*



Note. From *The Morgan Library & Museum Archives* [Photograph of J. Pierpont Morgan], (n.d.), (<https://www.themorgan.org/exhibitions/online/guide/stop-2-introducing-j-pierpont-morgan>).

Links to social network accounts

[Facebook](#) | [Twitter](#) | [Instagram](#) | [YouTube](#) | [Pinterest](#)

Mission and Vision Statements

Mission (Original)

The Morgan Library & Museum celebrates and shares the history and process of human creativity from antiquity to the present day through the preservation, study, and interpretation of a dynamic and growing collection.

Mission (Revised)

The Morgan Library & Museum authentically honors and shares the history and process of human creativity from antiquity, the present day, and into the future through the preservation, study, interpretation, and curation of a dynamic and growing collection.

Rationale for changes

The words “authentically” and “honors” acknowledge the potential shortcomings that also contribute to our history, addressed by the endeavor for provenance research. Adding “into the future” is a nod to a continued commitment to progress and modern technological changes and techniques that have become essential for organizations that have reached the caliber of the Morgan. Adding “curation” brings reference to a new, stronger emphasis on the propagation of exhibits, specifically digital exhibits, that more viewers may access.

Vision (Original)

The Morgan Library & Museum celebrates creativity and the imagination, with the conviction that meaningful engagement with literature, music, history, and art enriches lives, opens minds, and deepens understanding.

Vision (Revised)

The Morgan Library & Museum celebrates creativity, ingenuity, equality, and the imagination, with the conviction that meaningful engagement with literature, music, history, art, and technology enriches lives, opens minds, and deepens understanding.

Rationale for changes

Incorporating “equality” of information access to the both local and global patrons is a necessary addition, though the equality of people, such as the legacy of Belle da Costa Greene and the women of the Morgan exhibit, is the overarching priority here. The addition of “meaningful engagement” embraces the argument that well trained, more satisfied staff equates to a richer visitor experience, created by providing employees with competent wages and satisfying work. While “ingenuity” and “technology” are a nod to modern information resources providing a better way to share information with more people.

Environmental Scan Synthesis

Founded in 1924, the Morgan Library & Museum is responsible for an extraordinary collection of over three hundred thousand objects. As a team, we focused on several themes to create opportunities for the Morgan’s staff, patrons, and community. With a strong financial position, the Morgan has the opportunity to ensure sustainable wages, expand their digital footprint, embrace diversity, and strengthen archiving practices.

In order to foster an effective working environment to fulfill the Morgan’s mission to deliver high quality services to patrons, ensuring that employees are provided a competitive salary is ideal. Minimum wage is increasing, especially in areas like New York City, and organizations like the Morgan have the opportunity to pay their staff a living wage. A living wage not only benefits staff members, but also allows staff to support the organization they work for, without needing to supplement their income. The financial security of employees will add to the financial stability of the Morgan.

While its museum boasts an impressive collection, the Morgan also hosts exhibits online for viewers around the world to experience for free. Remote visitors can enjoy specialized online exhibits, but also virtually tour the library and museum and special features on its social media pages. Through online channels, the Morgan is able to reach a global audience of all ages and engagement preferences. The Morgan strengthens the information science field by continuing to create digital collections, provide digital archives of rare and fragile artifacts, and utilize archival preservation to expand its already impressive digital exhibits.

There are several areas of social concern that are affecting museums. The Morgan has one of the highest admission fees in New York City which may prevent local community members from visiting. However, the institution launched a pilot program focused on reaching teens and youth from underserved communities. In addition to offering free admission to college students one Sunday a month. Concerns related to the origin of artifacts is also a concern, especially those of Native American origin. Recently, artifacts being returned back to original communities, homeland, and rightful owners has become

more of a prominent concern in the media. While the Morgan acknowledges that it is housed on the land of the Lenape people, Lenapehoking, they do not provide any information on the process of reviewing and assessing the Morgan's artifacts for provenance. Lastly, climate change issues require the Morgan to look for ways to improve sustainability and energy efficiency by implementing essential infrastructure and everyday policy changes.

Strategic Goals

1. Employee Wages
2. Digital Footprint
3. Artifacts & Archives

Strategic Goal 1: Employee Wages

Employees being paid a fair wage should continue to be a priority for Morgan. While they may be actively hiring staff diverse in age, gender, and race, paying staff a liveable wage would be a significant benefit for the staff, and future staff, that work for the organization. Continuing to pay competitively will lead to more satisfied employees that support and promote the Morgan in ways that marketing dollars cannot.

Objective 1- To increase employee salaries for the staff of the Morgan Library & Museum therefore improving livable wages and staff employer satisfaction.

Minimum wage is increasing, especially in areas like New York City, and organizations like the Morgan have the opportunity to pay their staff a living wage. The financial security of employees will add to the financial stability of the Morgan.

Outcome:

Employee effectiveness with day-to-day operations has increased.

Outcome indicator:

The number of employees who report feeling a greater sense of belonging and morale increased by 25% over a three year period.

Actions/Activities/Outputs

- Job listings will include a competitive salary range, enticing applicants
- Current employees will receive an increase in compensation that is equivalent to a liveable wage in NYC

Measurements (Output and Performance Indicators)

- Hired applicants will be fairly compensated with salaries that allow them to receive a living wage
- When providing organization feedback regarding compensation, current employees will report that they feel appropriately compensated
- Surveyed guests will respond that they heard about the Morgan from an employee, showing an increase in Morgan employees discussing the organization

Objective 2 - To boost financial stability the Morgan will be able to support livable employee salaries.

The Morgan maintains a strong financial position. Per their most recent publicly available IRS form 990 (2022) for the 2021 tax year, this organization raised over \$24,000,000 simply through investments, contributions, and grants, and held an overall budget surplus of nearly \$3,000,000 for the year, despite the heavy impact of the COVID pandemic. Additionally, net assets (total assets less total liabilities) were nearly \$400,000,000 that tax year.

Outcome:

HR Leadership increases skills in attracting a diverse workforce and retaining employees.

Outcome indicator:

75% of HR leadership report feeling better equipped to attract diverse new-hires and to retain existing employees over the next fiscal year.

Actions/Activities/Outputs

- Job descriptions will be adjusted to appeal to a wider variety of candidates
- HR Leadership will have a new process for qualified candidate applications
- Financial funding will be increased with the aim to hire more staff

Measurements (Output and Performance Indicators)

- Staff of the Moran will show a documented increase in diversity over a five year period
- Resignations will decrease in Morgan employees, with retirement being outlying metrics

Strategic Goal 2: Digital Footprint

Expanding a digital footprint is a significant way for the Morgan to remain an

inclusive organization. The website is a primary source of visual information regarding historical organization information, a digital walkthrough of exhibits, and a strong accessibility for 'digital visitors' across the globe. The Morgan plans to continue running Diversity, Equity, Access, and Inclusion (DEAI) programs in order to adhere to the codes of ethics and values of ALM.

Objective 1 - To increase the number of digitally archived items remote patrons can enjoy.

Online exhibits present an opportunity to reach patrons that may be unable to visit in person, find the entry fee prohibitive, or encounter other barriers to experience the Morgan's impressive collection. These free, accessible exhibits can also benefit the Morgan through increased awareness and attraction.

Outcome:

Remote patrons access a higher number of digitally archived items.

Outcome indicator:

A 50% increase in visits to the Morgan's website focusing on digitally archived items will increase awareness of the museum itself, and digital archived collections, in the next fiscal year.

Actions/Activities/Outputs

- Train a subset of Morgan staff in information design, in a trainer of trainers model
- Create interactive online exhibits of interest to scholars for research and educational purposes
- Create interactive online exhibits to appeal to and attract the general public
- Add digital content for 3 permanent exhibits

Measurements (Output and Performance Indicators)

- 5 staff members trained
- 7 interactive pages developed and posted
- Measured website traffic tracking will show an increase in the number of visitors to the museum's website and to its individual online exhibits webpages
- Surveyed visitors will cite the website and online exhibits as a drive to visit the Morgan in person

Objective Statement 2 - To direct monetary resources, emphasizing digital archives, for archivists and historians to provide renderings of rare and fragile artifacts.

By directing more resources and emphasis on its digital archiving efforts, the Morgan can provide digital renderings of rare and fragile artifacts and utilize these digital records to supply and sustain its digital outreach efforts.

Outcome:

Archivists and historians will increase their digital skills and practices.

Outcome indicator:

80% of archivists and historians will utilize monetary resources provided by the Morgan, emphasizing digital archives that focus on digital records of rare and fragile artifacts, shown through the increase of digital archival records over the next five years.

Actions/Activities/Outputs

- The Morgan will increase the overall archives budget, focusing on digital archives, creating a prioritization of the archives as a department
- Expand the digital archive collection to provide more source materials for online exhibits
- Collaborate with other information institutions leveraging the additional lendable artifact resources from an expanded archive

Measurements (Output and Performance Indicators)

- Archive materials show an objective, quantifiable increase in the number of items in the Morgan's digital archive
- Employee satisfaction surveys report archivists of the Morgan are confident and empowered about the work they do and the organization they work for
- The number and variety of online exhibits increase due to the organizations access to digital source materials
- The Morgan's expanded digital archives and online exhibits prove successful when tracked by comparing and correlating digital archive visitors

Objective Statement 3: To increase an awareness of the organization to social media users therefore becoming aware of the organization, regardless of proximity to NYC.

Social media has increased the likelihood of users to experience FOMO, or the Fear of Missing Out. With the surge of social media use during the pandemic and library lovers from around the continental US wanting to avoid FOMO, there has been an increase in IRL (in real life) museum and historical museum attendance over the past two years.

Outcome:

Social media 'BookTok' users become aware of the organization increasing their desire to visit the Morgan, even traveling from out of state.

Outcome indicator:

There will be a 70% increase of awareness of the Morgan, increasing social media followers and out of state visitors from August 2024 until July 2025.

Actions/Activities/Outputs

- Survey users about awareness of the Morgan after running paid ad campaigns targeting BookTok users
- Create hashtags to use in digital marketing campaigns
- Include promoted posts from the Morgan TikTok and Instagram accounts, targeting social media users to repost and comment

Measurements (Output and Performance Indicators)

- Feedback from BookTok users will show that a majority of users are aware of the Morgan
- Developed hashtags will be used by non-Morgan accounts when posting about books, libraries, and museums
- On TikTok and Instagram, out-of-state residents will be 25% more likely to repost and comment than they have in the past two years

Strategic Goal 3: Artifacts & Archives

The sources of artifacts and archival items within the Morgan is of value to not only the Morgan, but also to the artists, families, and communities that the artifacts were derived from. It is strongly recommended that the Morgan continues to prioritize confirming the sources of artifacts and archival items by being transparent about the acquisition, provide written documentation, and maintain public records for individuals to reference when researching the artifacts on hand.

Objective Statement 1 - To establish a provenance research process of the Morgan's artifacts.

The Morgan Library & Museum staff is committed to establishing current provenance research for any artifacts within our collections that do not have one. For those that already have their provenance information, the Morgan staff will request a third party to substantiate those records.

Outcome:

The art community perceived the Morgan as a principled institution with ethical provenance research and techniques.

Outcome indicator:

75% of the Morgan artifacts will be put through a provenance research process to analyze artifact acquisition history over a three year period.

Actions/Activities/Outputs

- Evaluate existing artifacts on display and in archives
- Procure new artifacts
- Work with a third party artifact authentication company

Measurements (Output and Performance Indicators)

- Artifacts on display and in archives will be confidently labeled as appropriately acquired
- Artifacts on display and in archives that do not pass provenance research, will be further evaluated by a third party authenticator
- New artifacts will be displayed only when provenance has been justified
- Existing and derived artifacts that have questionable origins will be publicly recognized and returned to the rightful community it stemmed from

Objective Statement 2 - To increase awareness and knowledge of patrons and visitors about the history behind the Morgan's artifacts.

The Morgan Library and Museum is dedicated to providing patrons and visitors with additional information of our artifacts within the Morgan's collections to broaden the public's understanding of the artifacts and their place within the art community.

Outcome:

The patrons and visitors' artifact awareness and acquisition knowledge will be increased.

Outcome indicator:

65% of the Morgan's patrons and visitors reported being more informed about the artifacts and their lineage within the next four years.

Actions/Activities/Outputs

- Morgan patrons will attend themed virtual talks and tours
- Expand virtual talks and tours to engage patrons.
- The museum will hold more Informational lectures and film screenings throughout the year

- Create more access to painting programs and introductory history of organization artifacts.
- Morgan catalogs will include an updated introduction history about the organization

Measurements (Output and Performance Indicators)

- 26 virtual talks and tours will be held each year
- 13 lectures and film screenings will be released
- 13 painting programs will be held for patrons
- 65% of the patrons and visitors will show a marked increase in knowledge regarding information about the art and history of the organization

Objective Statement 3 - To attract diverse art and artist enthusiasts to join the Morgan via membership, expanding the global community.

The Morgan Library & Museum is dedicated to educating local and global communities through diverse collections in-person and digitally.

Outcome:

The Morgan's members' perception of diversity and inclusivity will be increased.

Outcome indicator:

60% of the Morgan's members and guests surveyed regarding arts and artists showcased, will report an awareness of diversity and inclusivity over the next five years.

Actions/Activities/Outputs

- Artists of diverse backgrounds will be invited to collaborate with the Morgan
- Art from diverse and underrepresented communities will be showcased in common areas of the Morgan
- Follow up visit surveys will be conducted via patrons emails

Measurements (Output and Performance Indicators)

- Culturally diverse features will make up 30% of the on-exhibit museum pieces of the Morgan
- Survey systems located in the common areas of the Morgan will include inquiries about the patrons favorite pieces scattered throughout
- Follow up surveys show a 60% increase in awareness of a culture similar or different from the patrons surveyed

Final Words

Reflecting on the vibrant 100 year history of the Morgan Library & Museum, we believe the Morgan is capable of supporting strategic goals focused on diversity, sustainable wages, a thoughtful digital footprint, and improved archiving practices. The Morgan is a beloved museum and research library that will continue to thrive and inspire while creating meaningful opportunities for the staff, patrons, and the community within New York City and beyond by upholding its commitment to diversity, equity, and inclusion.

The Morgan's status as a cultural and architectural piece of history requires our dedication to preserve the building, grounds, and collections for future generations. A crucial part of this preservation includes acknowledging the history and roles played within the art world by becoming more open and transparent about the past and the present. In order to ensure organizational progress, the Morgan must continue prioritizing the comfort of museum goers both locally and globally. To preserve collections for future generations, the continued transparency of historical significance of the Morgan Library & Museum is necessary.

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Figure 2 Beyer, B. [Photograph of garden]. (n.d.) The Morgan Library & Museum.

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Figure 3 Hirsted, E.W. (1910). *Belle da Costa Greene* [Gelatin silver print]. The Morgan Library & Museum Archives.

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Figure 4 J. *Pierpont Morgan* [Photograph]. (n.d.) The Morgan Library & Museum Archives.

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