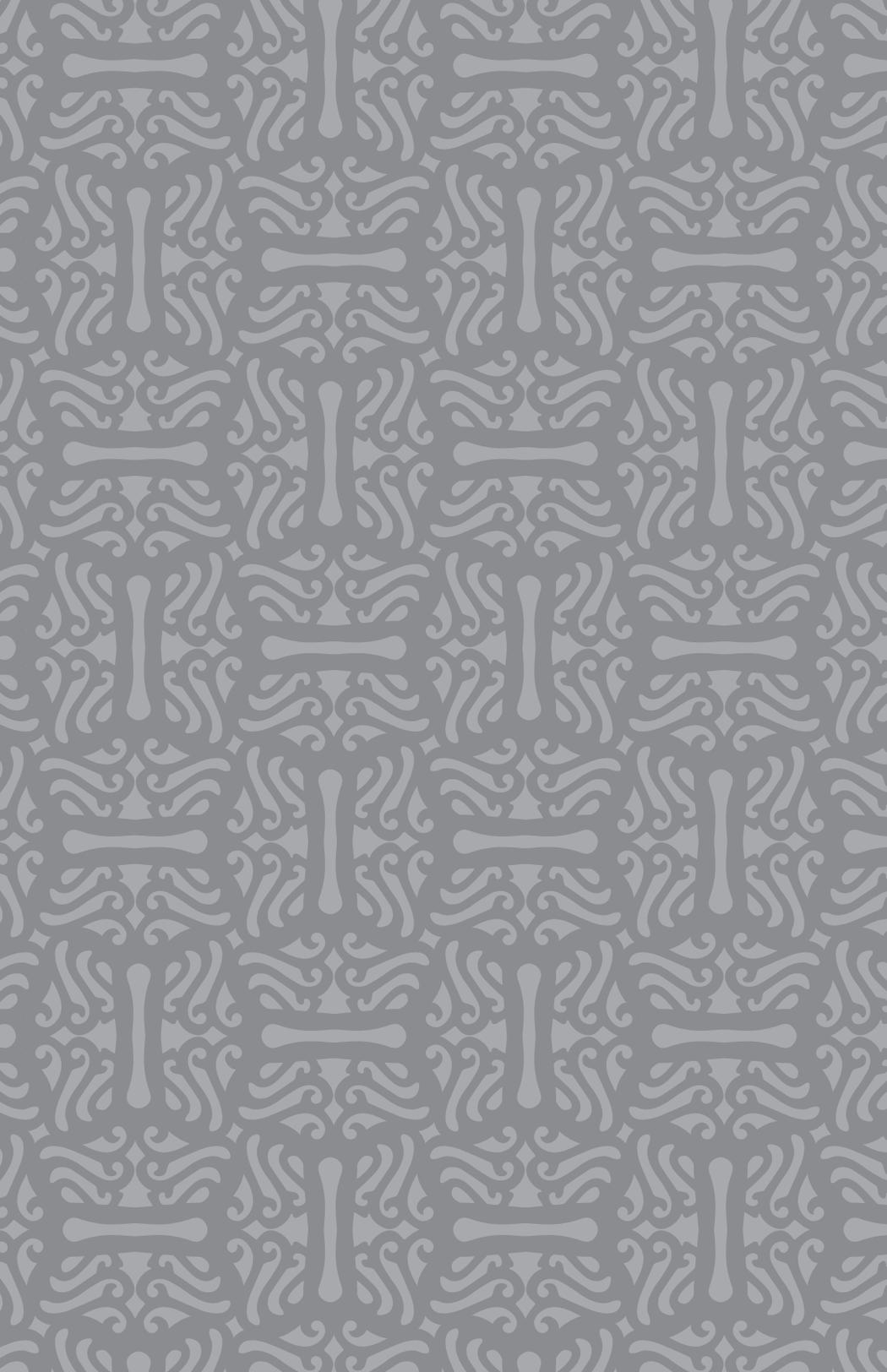




VISION
20
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A Strategic
Plan for the
Providence
Athenaeum

*Approved by the
Board of Directors
September 16, 2015*



THE PROVIDENCE ATHENAEUM

is pleased to present **VISION 2020**, its strategic plan for the coming five years, 2015 to 2020. Like our beloved institution, the plan represents a blend of old and new, and has been created through the diligent efforts of many minds, hands, and hearts. We invite your contemplation of this imagined future, and we encourage you to share in it and to become part of it.

Over the course of our analysis, reflections, and discussions, one clear theme emerged time and again: the Athenaeum is “hitting above its weight.” The Athenaeum has established an enviable track record of excellence, accomplished with limited resources. It has revitalized, embraced, and carried out a mission, based on long-standing values articulated in its earliest founding, of opening its doors to the public and acknowledging an obligation to lead in the cultural sector. The challenge we identify here is to more deeply commit to this mission and ensure its sustainability.

The Athenaeum closes out its first five-year strategic plan, *Vision 2015*, with progress achieved in every goal. **VISION 2020** articulates the strategic priorities for the coming five years, and in so doing raises the bar on what the Athenaeum intends to achieve. Our organization continues now from a strong position and is prepared to take on new challenges in the years ahead. We are grateful for the steadfast support provided by our members and others in our community over many years, and we intend to demonstrate fully that gratitude by becoming, in every way, an exemplary cultural institution committed to its public mission.

Candy Adriance

Candy Adriance
Board President



Matt Burriesci
Executive Director

VISION 2020 endorses and embraces its predecessor, *Vision 2015*. The expressions of *mission*, *core values*, and *vision* are as meaningful and relevant today as they were five years ago.

It is gratifying to recognize the advances made towards each of the goals and strategies of *Vision 2015* over the past five years. Progress has been achieved through the willingness of the Athenaeum to be both bold and prudent by turns, to take reasonable risks, and to ask more of itself and of the communities that it serves. Much has been accomplished, and a highlight of achievements over the past five years can be found on page 22.

VISION 2020 began from the premise that opportunities and challenges for the Athenaeum could be best understood by seeing them in a comparative perspective. Two peer sets were developed and analyzed: our fellow member-supported libraries around the United States and our fellow cultural and arts organizations in Providence. These comparisons provided context and many insights.

VISION 2020 was conducted by working groups composed of Athenaeum staff and board members, in consultation with Athenaeum members, community partners, and other key stakeholders. This approach allowed the staff and board to work together directly in common purpose, to leverage both the deep institutional knowledge of the Athenaeum staff and relevant professional skills and experience of board members, and to leverage the strength and wisdom of the broader cultural community. The process also benefited from the selective use of professional consultants.

We recognize that the strategic priorities and recommendations articulated here constitute a varied group—some will take longer to accomplish, and be more difficult to undertake, than others. In identifying them as priorities, we recognize that we must commit resources to them today and into the future.

The Athenaeum is very grateful for financial support provided to this strategic planning effort. Specifically, we sincerely thank The Rhode Island Foundation and the Ida Ballou Littlefield Memorial Trust.

4 MISSION & CORE VALUES

7 STRATEGIC PRIORITIES:

- **PROMOTE** *the Athenaeum's public mission by continuing to invest in its distinctive programming*
- **BROADEN** *Athenaeum constituencies*
- **ALIGN** *collections policies to improve access, control growth, and address preservation*
- **EXTEND** *the use of relevant technologies*
- **INVEST** *in the improvement of the building and grounds*
- **ALIGN & DEVELOP** *staff organizational resources*
- **FURTHER** *strengthen the Athenaeum's financial position*
- **ENHANCE** *the effectiveness of the board of directors*

22 HIGHLIGHTS 2015–2016

24 ACKNOWLEDGMENTS

MISSION

The Providence Athenaeum, a unique library and cultural center, welcomes and enriches the educational and cultural pursuits of its members and the community and encourages a diverse public to engage in spirited conversation. It offers a wide range of experiences by providing and conserving extraordinary collections, offering innovative and compelling programs, promoting and collaborating with the community's vibrant cultural sector, and highlighting and preserving its historic building.

CORE VALUES

The Athenaeum believes that:

- Culture, humanities, history, and the arts are important to human understanding.
- Civic exploration and lively discussion with the active participation of a broad and diverse population are critical in fostering a democratic society.
- Different points of view are respected.
- The arts and culture of the city and state are valuable contributors to community vitality.
- Collaboration builds stronger and more efficient programs and institutions.
- All members, visitors, participants, Board, volunteers, and staff are valued and respected.

It is the design of the [Athenaeum's] proprietors that it should be useful to all... They intend that there shall be no occupation, whether professional or industrial, which shall not find here the means of both instruction and relaxation. They mean here to open a fountain of living water, at which the intellectual thirst of this whole community may be slaked.

Let us abandon, forever, and forget they ever existed, all local and petty distinctions. Let us not labor for the east side or for the west side, but for the city of Providence. In every useful and public-spirited object, let every hand beat time, all our hearts in unison; and if money be needed to accomplish it, let our wealth flow out like water.

**FROM FRANCIS WAYLAND'S ADDRESS
AT THE OPENING OF THE ATHENAEUM
JULY 11, 1838**

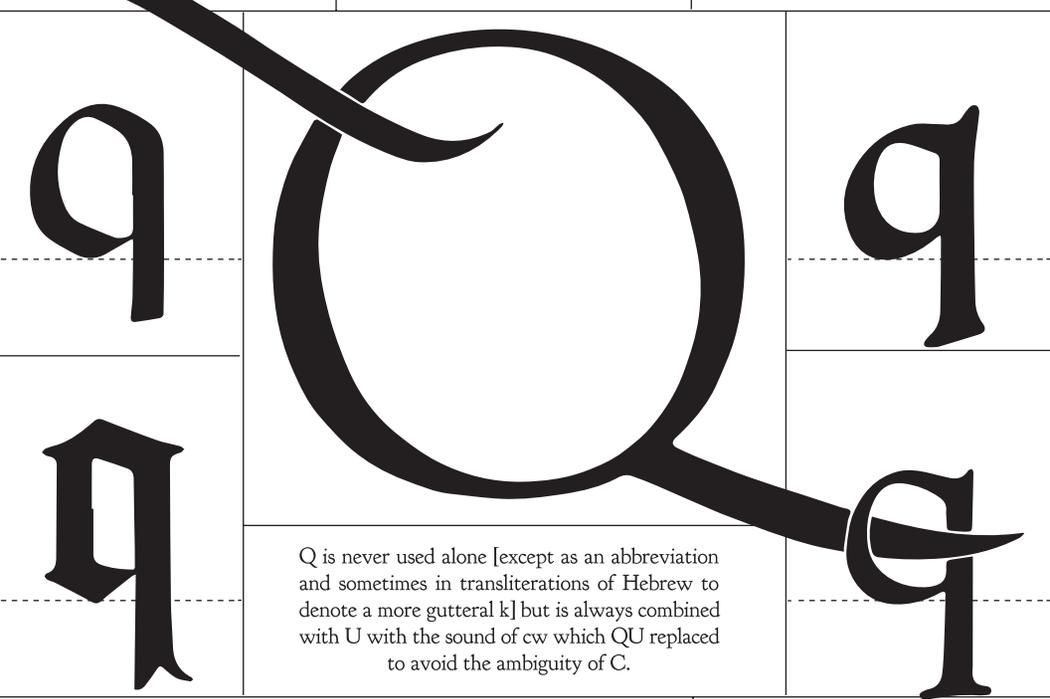


Programming at the Athenaeum is designed to introduce and welcome people to the organization by providing—regularly and free of charge—shared cultural experiences that manifest and build support for the library’s public mission. The Athenaeum is rare among member-supported libraries in its policy of open access to members and non-members alike without charge, and in its commitment to serving as the community’s “cultural amplifier” by extensive collaboration with local organizations and independent artists and scholars.

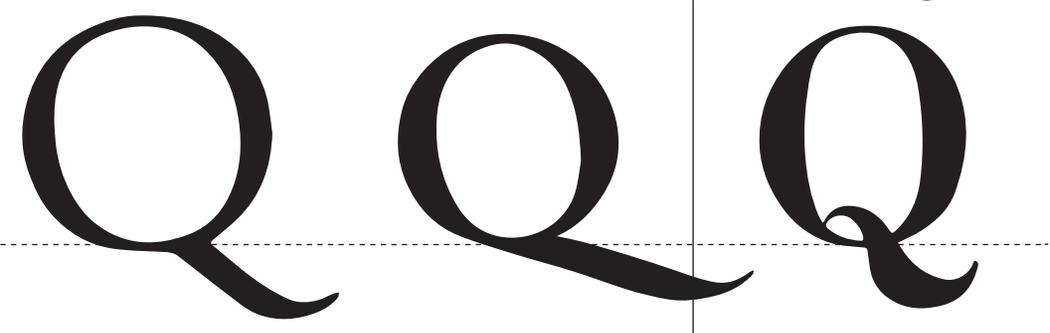
PROMOTE THE ATHENAEUM’S PUBLIC MISSION BY CONTINUING TO INVEST IN ITS DISTINCTIVE PROGRAMMING

RECOMMENDATIONS

- Develop goals and strategies to prioritize inclusiveness and diversity in programming.
- Expand the role of “cultural amplifier” and practices of collaborative program development with community and cultural partnerships.
- Claim and promote the distinctiveness of the Athenaeum’s cultural offerings, characterized by variety, breadth, depth, frequency, and public access.
- Leverage the creativity and collaborative method of developing programming to obtain grant support.
- Continue to commit resources to assure the continuity of program excellence.



Q is never used alone [except as an abbreviation and sometimes in transliterations of Hebrew to denote a more guttural k] but is always combined with U with the sound of cw which QU replaced to avoid the ambiguity of C.

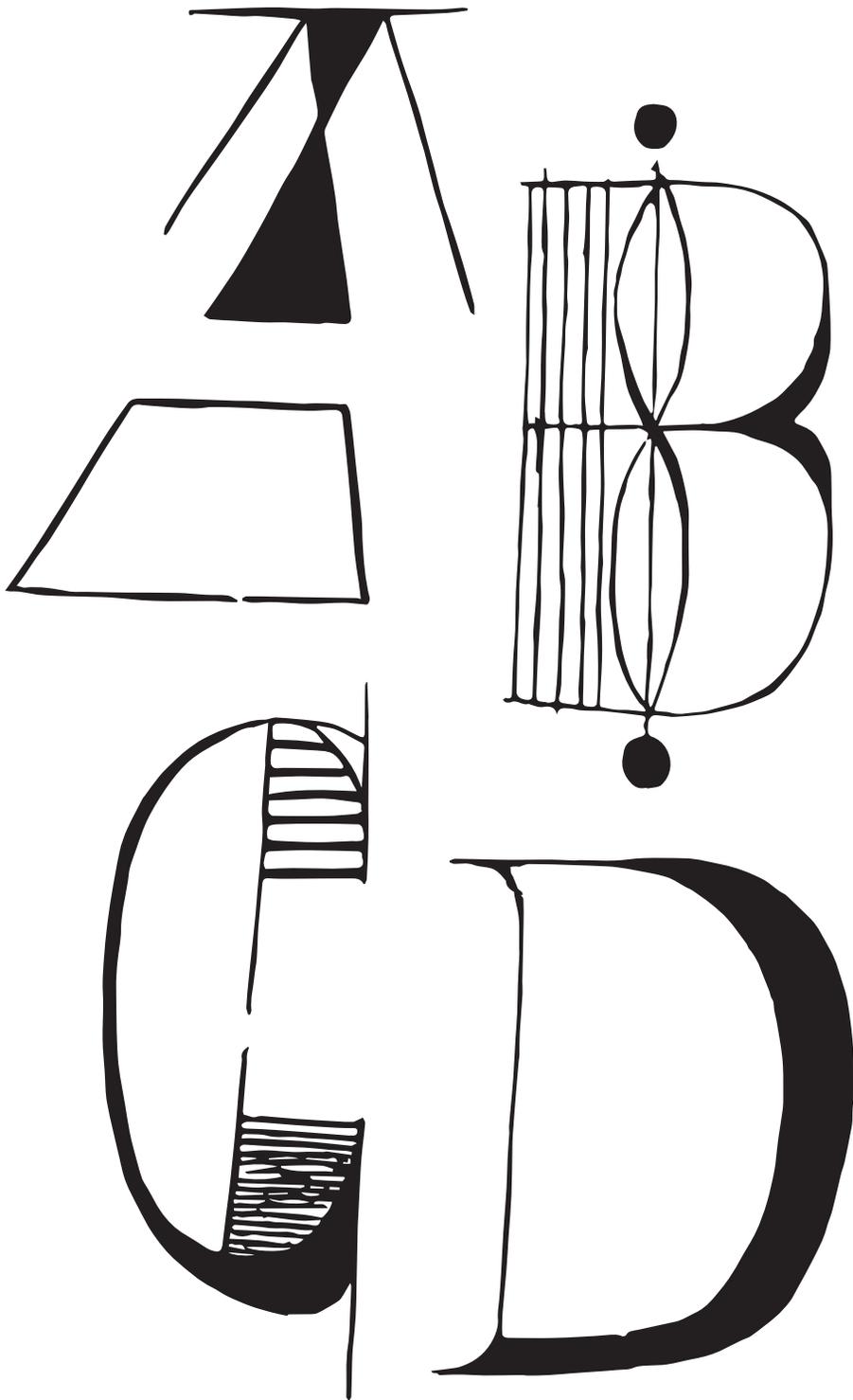


The Athenaeum must seek out and encourage participation and membership by people of differing experiences, backgrounds, and interests. The institution must live by the values it espouses; accordingly, greater diversity and broader participation will be sought among all its constituencies.

BROADEN THE ATHENAEUM'S CONSTITUENCIES

RECOMMENDATIONS

- Identify and collaborate with local organizations and groups who can introduce their members and constituencies to the Athenaeum, and whose work can be introduced to the Athenaeum community as well.
- Develop cultural offerings and initiatives that attract new audiences.
- Foster an environment in which all feel welcome and comfortable.
- Commit to and invest in achieving greater diversity among all the Athenaeum's constituencies: membership, staff, board, and collaborative partners.
- Create regular opportunities to take cultural offerings and collections out of the library and into varied communities throughout the state.
- Reach out to the non-member community to build membership.

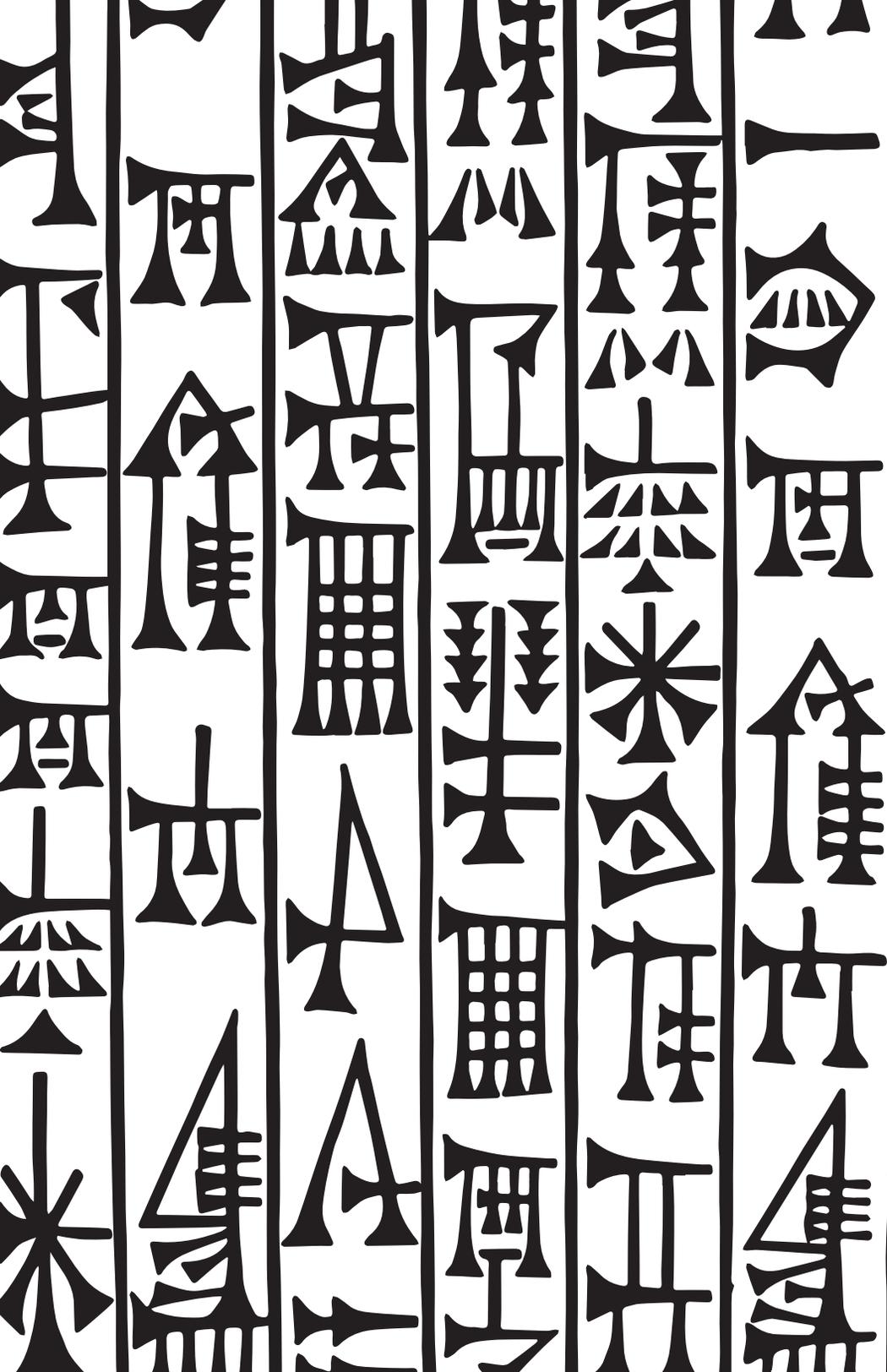


The issues of physical storage space, book funds, member interests, and the evolution of member interest in content technologies overlap, and drive professional staff activity. Comprehensive review of these issues will enhance collection focus, improve preservation of and access to materials, and reduce burdensome activities.

ALIGN COLLECTIONS POLICIES TO IMPROVE ACCESS, CONTROL GROWTH, & ADDRESS PRESERVATION

RECOMMENDATIONS

- Review and evaluate the circulating collections to refine the focus, control growth, increase access, and respond to member needs.
- Review book fund restrictions and allocation of funds to best meet the needs of membership and to regulate growth of the collections.
- Allocate funds to address preservation concerns of an aging collection.
- Explore opportunities and resources to digitize parts of special collections and archives.
- Review library shelf space, offsite storage, and retentions policies—develop a comprehensive solution beyond incremental improvement.



The Athenaeum must continue to be more than an archive of older printed materials. It must be a twenty-first century library that increases its operating effectiveness and broadens its reach to members and other users through the judicious application of technology.

EXTEND THE USE OF RELEVANT TECHNOLOGIES

RECOMMENDATIONS

- Define the Athenaeum’s relationship with technology in order to create and update decision-making policies for collections, library operations, communications, access, and infrastructure.
- Critically evaluate and rewrite the Athenaeum’s technology plan to assess and address previously deferred updates and current staff and member needs.
- Leverage advances in technology to reach and engage a broader audience.
- Monitor alternative infrastructure technologies as they develop.
- Assess collections in digital formats for the benefit of members, and pilot several in order to determine their value.

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E. VANDERPANT

Hon. A. R. J. B. A. 

The Athenaeum's building, while an important historic landmark in Providence, poses significant challenges, particularly in terms of space and accessibility. Future building maintenance and improvement needs are expected to require substantial investment.

INVEST IN THE IMPROVEMENT OF THE BUILDING & GROUNDS

RECOMMENDATIONS

- Recognize 251 Benefit Street as the Athenaeum's permanent home and invest accordingly for future generations.
- Prioritize life safety, access, security, and sound environmental practices in all building related activity.
- Develop a phased action plan for building sustainability, beginning with a full-building engineering life-cycle assessment, and geo-technical survey, supported by grant support where possible.
- Invest in an appropriate historic architectural preservation program of the building and grounds, while modernizing building systems.
- Broaden community and partner engagement with the library and building through local educational and historical institutions with programs in architecture, engineering, and design.



The Providence Athenaeum is a small organization that accomplishes a tremendous amount, thanks to a talented and experienced staff that has demonstrated commitment and resilience, and the ability to work effectively as a team and as individual contributors. While the Athenaeum cannot expand staff beyond its means, the need for succession planning and “bench strength” dictates the addition of incremental resources.

ALIGN & DEVELOP STAFF ORGANIZATIONAL RESOURCES

RECOMMENDATIONS

- Attract and retain skilled, experienced staff by ensuring competitive total compensation and benefits, committing resources to professional development opportunities, and providing a supportive work environment.
- Develop “bench strength” by the selective and flexible addition of resources.
- Institute succession planning for each managerial position.
- Institute formal review policies for all staff, including an annual performance review of the Executive Director, to identify and address performance challenges, risks, and opportunities.
- Strengthen organizational planning and communication processes to optimize efficient, collaborative workflow.
- Identify and implement appropriate opportunities for well-defined support from experienced, qualified volunteers to supplement staff resources.

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no. Et omnes angeli
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um actio: honor et
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la simularum.

The Athenaeum is fortunate to have an endowment valued at more than \$10 million, a stable and generous membership base, and a record of success in obtaining grants. While this is a strong position relative to many of our fellow member-supported libraries and our “Providence peers” in arts and culture, further improvement must be made to offset predictable increases in future operating costs.

FURTHER STRENGTHEN THE ATHENAEUM'S FINANCIAL POSITION

RECOMMENDATIONS

- Review Athenaeum investment policy for the endowment to achieve growth as well as income at reasonable risk.
- Promote a planned giving program at the Athenaeum.
- Allocate development efforts to cultivate philanthropic leaders.
- Pursue strategic opportunities for higher levels of grant support, both locally and nationally.



The Athenaeum has benefited from a stable and talented (rotating) board of directors with a wide range of personal and professional backgrounds. The board remains committed to improving its stewardship, supporting the institution, and helping the staff advance the Athenaeum's mission.

ENHANCE THE EFFECTIVENESS OF THE BOARD OF DIRECTORS

RECOMMENDATIONS

- Align board activities and responsibilities with strategic priorities.
- Establish, document, and communicate clear expectations of roles and responsibilities between the board and the Executive Director.
- Establish a board governance committee to assure consistency with all board-related policies and to monitor compliance.
- Establish board committees and ad hoc working groups as needed, as well as policies for committee rotation.
- Improve communication of board responsibilities to board prospects and improve orientation process for new board members.
- Conduct annual board self-assessment.

LIBRARY OPERATIONS

- Growth in total visitors from 33,688 (2011) to 39,271 (2015): **+16.5%**
- Growth in collection from 175,850 items (2010) to 183,904 items (2015): **+4.5%**
- Open to members and non-members alike for on-site use; members have borrowing privileges, including at RISD's Fleet Library
- Continue to operate 60 hours per week, seven days/week (September–May); and 52 hours per week, six days/week (June–Labor Day)

PROGRAMMING

- Established policy of all programming as free and open to the public as part of the Athenaeum's public mission, for both adult and children's programs
- Growth in collaboration with local organizations, including new programming initiative in 2014–2015 based on explorations of Athenaeum collections
- Growth in reading groups from two in 2010 to six in 2014–15, with participant growth from ~50 to ~200; free and open to members and non-members alike

MEMBERSHIP & DEVELOPMENT

- Growth in Annual Fund participants from 299 donors in 2009–10 to 512 donors in 2014–15: **+71%**
- Growth in Annual Fund donations from \$136,530 in 2009–10 to \$219,684 in 2014–15: **+61%**
- Growth in number of donors giving more than \$500 from 73 in 2009–10 to 91 in 2014–15: **+25%**

FINANCIAL POSITION

- Growth in value of endowment from \$8.2 million (December 31, 2009) to \$10.2 million (December 31, 2014), net of a draw of \$2.2 million over five-year period
- Line of credit fully paid off; Athenaeum currently has zero debt
- Operated at or near a balanced budget every year, 2010–2014

BUILDING & GROUNDS

- Renovations and reconfigurations of the Bound and Reading Room
- Awarded Champlin Foundations grant in 2015 of \$161,000 for public space improvements to the Reading Room, the Philbrick Rare Book Room, and staff offices

ACKNOWLEDGEMENTS

The Athenaeum is grateful to the Rhode Island Foundation for its generous support that enabled us to conduct an internal assessment, and to the Ida Ballou Littlefield Memorial Trust, which provided support to help address other costs of strategic planning, including the visual audit and website redesign.

We thank the members of the Strategic Planning Committee who monitored the process throughout. We appreciate the board, staff, members, community partners, volunteers, and other stakeholders who gave their time to participate during the plan's assessment and development.

IMAGE ATTRIBUTIONS

Goudy, F.W. *The Alphabet and Elements of Lettering*. New York: Dorset Press, 1942. (745 QG723A)

Holme, C.G. (Ed.). *Lettering of To-Day*. New York: Studio Publications Inc, 1937. (745 QH733)

The illustrations throughout this publication are taken from two volumes housed in the Athenaeum's Art Room—a space named not for the art on its walls (although a significant number of the library's portraits hang there), but for the collection within. In 1896, Elizabeth Goddard Shepherd, the daughter of one of the 1836 library's founders, donated funds to convert a mezzanine storage area above the front entrance to a comfortable study-like space to house the Athenaeum's growing art collection. Our art, art history, and design collection is extensive, and represents the continuous interests of over two centuries of Providence's readers. The library still uses this room to store circulating and non-circulating oversized art and design books. Members are welcome to use the Art Room as a private workspace.



THE
PROVIDENCE
ATHENÆUM

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providenceathenaeum.org