

# WILLIAM L. CLEMENTS LIBRARY STRATEGIC PLAN 2022-2027



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# OVERVIEW

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Over the course of a year of mostly remote meetings during 2021 and 2022, the staff of the William L. Clements Library (WCL) worked collaboratively to develop the following strategic plan to guide its work for the coming five years. The plan sets out a desired vision for the future state of the library, as well as what will be required to achieve that vision. The plan provides a set of goals that describe the outcomes the library hopes to achieve, as well as objectives that represent key metrics that affect the library's ability to achieve its goals. The vision and goals described here are all in service of the library's mission to collect, preserve, share, and promote the study of original materials related to the history of North America, and in particular to put the library's collections to use in work that will further the research and teaching mission of the University of Michigan. The plan is rooted in the library's remarkable collections, an understanding of library's position at the center of the campus of one of the nation's greatest (and largest) universities, and an awareness that putting the library's collections to use to tell inclusive stories that recognize all aspects of the diversity of the nation's past is one of our most profound ethical obligations.

In the future, the Clements Library will need adapt to the many differing needs of a constantly evolving campus and scholarly community. Therefore, underlying this plan is the adoption of an ongoing process of operational planning and strategic thinking, designed to ensure relevance of direction and action over time. This type of strategic planning is relatively new to the Clements, and embedding the priorities identified in the plan in our day-to-day operations is a crucial vector of organizational growth. In developing an annual operational plan, WCL staff will develop strategies that define the people, dollars, and time resources devoted to making incremental progress toward the long-range goals. Action plans, checkpoints, and milestones will help to define resource needs and monitor progress.

The strategic plan identifies what the Clements is not doing today but must be doing in the future to be successful. Consequently, the strategic plan implies change--doing new things or doing more or less of current activities to ensure successful outcomes. Therefore, a formal Strategic Plan review should be held annually, where WCL can assess changes in the environment, continued relevance of purpose, values, vision, and goals, assess progress made in the previous year, and set priorities for the coming operational planning year. This ongoing evaluation of the library's strategic plan will also proceed in coordination with the development of goals as part of the University of Michigan's DEI 2.0 strategic planning process. Questions of diversity, equity, inclusion, and access were central to the library's strategic planning process. We see our strategic plan as being integral to our goals of making the full range of Clements collections available to users from all walks of life in support of their work to represent all aspects of the American past.

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# LONG-TERM PLANNING HORIZON

## CORE PURPOSE & VALUES

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### **Mission/Core Purpose:**

- To collect, preserve, share, and promote the study and discussion of primary sources related to all aspects of the history and culture of North America and the Caribbean to 1900.

### **Core Values:**

- ***Access*** - We provide members of the University of Michigan community, scholars around the world, and the general public with access to the library's intellectual, digital, and physical resources.
- ***Stewardship*** -We are committed to the ethical acquisition, preservation, and continuing availability of diverse primary source materials that can tell the full story of our history, and to ensuring their availability to future generations of students and scholars.
- ***Research*** -We support research in our collections sparked by intellectual curiosity, ongoing critical evaluation, an emphasis on equity and inclusion, and a desire to discover and present new knowledge about the past, rooted in the belief that much of our history remains to be written.
- ***Inclusion*** -We seek to foster a warm, welcoming, and inclusive environment where all staff and visitors feel safe, valued, and respected, and where equitable and creative work is valued.
- ***Partnership*** -We collaborate with public and academic communities through substantive conversations and partnerships rooted in mutual trust and awareness of the limits of our own ability and knowledge.

## **Envisioned Future State**

The staff created the following narrative descriptions of the future state of the library to more fully describe the impact of the strategic goals identified above. All of the elements of the library's future described below should also be understood in the context of the commitments that will be part of the library's DEI 2.0 strategic plan.

In five years, the Clements library will be a dynamic hub for the exploration and study of early American history and culture, where users from all backgrounds and disciplines feel comfortable accessing collections, thinking expansively about them, asking challenging questions, and building collaborations in the community and across campus to tell their stories.

What will that future look like? How will we know that we have made progress?

- Everything that the Clements Library does rests on two pillars: the collections and the staff. The Clements continues to build on the strengths of its remarkable holdings as well as builds new collections to support future directions in research. We also continue to build the capabilities and skills of our staff in order to improve how we do our current work and to meet new challenges.
- The reading room is a consistently busy place, populated with a mix of users: Clements Library fellows, undergraduate and graduate students, faculty, genealogists, community members, and artists. We are excited to work with researchers of all kinds and have the capacity to accommodate those who need to consult collections, but we also have space and resources for those who are just curious about who we are and what we do. We have ample hours for research as well as ways for people to engage with us and our collections beyond the reading room.
- It's a given that the Clements is a key resource for students across the disciplines at Michigan. They learn about us early in their time here, whether through classes, tours, programs, or training opportunities, and they feel confident using the collections and reaching out to staff for support.
- Clements research fellowships are seen as an exceptionally rewarding and diverse program for individual scholars that also brings benefits to the campus and the general public. Our fellowship program supports a wide base of users and is adaptive to the needs of different audiences, rooted in the quality of the in-person experience in the reading room.
- We are proud to see the seeds of big projects sprout here—whether that be with fellows connecting with each other in conversation about their work, community members knowing about our resources and trusting that they can approach us with a question or idea, K-12 teachers turning to us for resources as they explore history with their students, faculty members reaching out to us when they are planning new classes or research projects, conference planners wanting to partner with us to build spaces for

scholarly creativity and conversation, and other libraries and museums seeing us as a partner to collaborate or connect collections.

- Undergirding all this work is a fundamental commitment to inclusion. We are able to take time to assess whether our actions and ideas promote equitable access, and we have the training and resources to be able to address challenges in this area.
- Clements staff members are well-known and respected in their professional fields and are active at academic and professional conferences. Staff have the ability and interest to pursue new initiatives and engage in collaborations, and are supported in these efforts
- The Clements collections and the community built around them are valued by the university's administration and faculty, and they support the library as a key contributor to the university's academic mission to build critical thinking skills, engage with the community, and educate future leaders.

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# 5-10 YEAR PLANNING HORIZON

## ~ ASSUMPTIONS ABOUT THE RELEVANT FUTURE ~

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*The assumptions presented below about the future environment in the library world and the humanities more broadly will help the Clements purposefully update its strategic plan on an annual basis. As the outcome-oriented goals that will form the basis of the long-range strategic plan will be based on the vision of the future that appears in this section, an annual review of these assumptions will be an appropriate method of determining and ensuring the ongoing relevance of WCL's strategy and goals.*

### **Social/Cultural Context**

1. American history will continue to be a highly charged and politicized area of public discussion.
2. Institutions that cannot demonstrate a visible commitment to diversity, equity, and inclusion in their collections and programs will be at an increasing disadvantage in attracting new users.
3. The perceived irrelevance of the humanities to large social questions will likely continue, and it will be necessary to demonstrate continued relevance.
4. The ongoing impact of the pandemic will lead audiences of all kinds to prioritize virtual research and programs over in-person experiences. The pandemic has shown that digital programming is important and will continue to be a need.
5. Climate change disaster planning may be important in the future.
6. Political polarization may make it more difficult to expand our audience of supporters.

### **Higher Education Context**

1. Humanities departments may continue to face declining enrollments in the face of increasing college costs and perceived desirability of STEM degrees.
2. Learning that prioritizes hands-on experience and the creation of projects beyond the traditional research paper will be increasingly important. New models of teaching that prioritize communication and collaboration will become more prevalent.
3. Increasing numbers of students will continue to arrive at college lacking the training to engage with primary sources from the American past, whether in person or virtually.
4. The disappearance of tenure-track positions in the humanities fields that most heavily overlap with the Clements collections and the likely decline in significance of the scholarly monograph will impact our pool of potential researchers and will require us to seek new audiences of users.

## **Library Sector Context**

1. Libraries of all kinds will be under increasing pressure to provide digital access to their collections.
2. The staff pipeline into careers in special collections and archives will continue to be limited by the small number of open positions and the lack of diversity within the field.
3. Libraries with collections that do not represent diverse perspectives will face challenges in making their holdings relevant for instruction and research.
4. Materials that reflect the experiences of diverse communities in America will continue to rise in price and scarcity on the auction and resale market.
5. Special collections libraries and archives will continue to be seen by most students and community members as elite spaces where they are not welcome unless those institutions conduct meaningful outreach.

## **Institutional Context**

1. Contribution to the university's academic and instructional mission will continue to be the primary scale of evaluation for all units on campus.
2. Units that are easy for students and faculty to work with and that provide multiple different modes of engagement will be better positioned in the competition for university resources.
3. Retention of students and faculty of color will continue to be a significant challenge.
4. Budgetary pressures on non-tuition-generating units will continue, if not increase.
5. Our approach to our cataloging backlog across our divisions will continue to limit the discoverability of our collections for audiences on campus and beyond.
6. The demographic makeup of our primary pool of supporters will need to change to ensure the library's future viability.
7. Our lack of connections with other units on campus as well as national/international collections may continue to limit awareness of the Clements.
8. The University's major fundraising campaign will impact WCL fundraising priorities.
9. The impending changes in the University's leadership will have an impact on WCL.
10. Cultural collections will continue to be a niche, and we don't fit easily anywhere in the university's structure.
11. The University's controlling infrastructure--building constraints, additional storage, phone lines, internet, etc.--represent things that are out of our direct control.

## **Clements Library Context**

1. The Clements staff will remain loyal and dedicated to its work and mission.
2. Decisions at an administrative level will continue to be accomplished with a Board that will be interested in the projects that we do.
3. There will be an increasing need for a diverse set of viewpoints. A more diverse demographic makeup of supporters will ensure the library's future viability, and the Clements will continue to struggle with recruiting diverse candidates.
4. There will continue to be ongoing reparative legacy work.
5. Until an equity review is performed, there will continue to be concerns among staff about the degree to which they are valued.
6. Continued challenges of limited physical space may make reaching goals difficult.
7. Staffing levels will make attainment of vision goals difficult.
8. Absence of a map curator will be a challenge going forward.
9. Connections with other units on campus as well as international and national connections will enhance the reputation of the Clements.
10. There will be continued assumption of a model of scarcity – the Clements will have to keep trying to get resources and funding from the university.
11. The cost of living in Ann Arbor will increase, impacting both staff and researchers.



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# 3-5 YEAR PLANNING HORIZON

## OUTCOME-ORIENTED GOALS AND OBJECTIVES

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*Goals are outcome-oriented statements that represent what will constitute the library's future success. The achievement of each goal will move the organization towards the realization of its vision. The goals are not in any order of priority. Every goal will need to be accomplished if the organization is to fully achieve its vision.*

*Each goal described below is accompanied by a set of **objectives**, which represent key issues affecting the library's ability to achieve the goal and articulate milestones against which to measure progress, as well as **strategies**, which define specific actions to be accomplished in order to make progress toward the goal.*

### **Goal 1: Heightened National Profile**

The Clements Library will increasingly be seen as a must-visit destination for scholars, broadly defined, interested in American history and culture. The library's reputation for excellence in supporting research will rest on the patrons' interactions with staff as well as the strength and discoverability of the collections.

### **Goal 2: Student Experience**

University of Michigan students will be aware of the Clements Library, its contents, and that the library exists to support their objectives. Students will learn that they are welcome to the Clements and will experience a supportive learning environment when they visit.

### **Goal 3: Professional Development**

Clements Library staff will have the opportunity to engage in professional and scholarly organizations in their fields and will have the financial and organizational support to attend, network, gain skills and knowledge, or present work that increases awareness of the library and its holdings.

### **Goal 4: Instruction**

Instructors at the University of Michigan and elsewhere will have a clear understanding of what resources the Clements can offer to their classes and will think of the Clements first when planning classes that intersect with our collections.

## **Goal 5: Community Outreach**

Through community outreach the Clements Library will build authentic relationships with a variety of diverse constituencies, creating programs with them, and becoming a key partner in their work.

## **Goal 6: Organization**

The Clements Library will foster a supportive institutional culture with a structure and processes in which staff feel valued and empowered.

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## **GOAL 1: HEIGHTENED NATIONAL PROFILE**

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### **Goal**

The Clements Library will increasingly be seen as a must-visit destination for scholars, broadly defined, interested in American history and culture. The library's reputation for excellence in supporting research will rest on the patrons' interactions with staff as well as the strength and discoverability of the collections.

### **Objectives:**

1. Increase staff participation in conferences.
2. Increase discoverability of collections.
3. Increase partnership with external institutions.
4. Expand our definition of "scholar" and determine which groups we want to focus on reaching.
5. Increase our efforts to play a leadership role in emphasizing the humanities as essential to education of all kinds including STEM.

### **Strategies:**

1. Re-evaluate staffing structure and add staff where possible.
2. Give staff more support/capacity to engage in national conversations.
3. Broader catalog department rather than divisions to tackle backlog and set priorities.
4. Modify/streamline cataloging processes.

**Priority - reducing backlog, figuring out day-to-day operations, determining our core responsibilities and what staff we need.**

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## GOAL 2: STUDENT EXPERIENCE

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### **Goal:**

University of Michigan students will be aware of the Clements Library, its contents, and that the library exists to support their objectives. Students will learn that they are welcome to the Clements and will experience a supportive learning environment when they visit.

### **Objectives:**

1. Improve student and faculty pre-visit and entry protocols.
2. Establish flexible processes related to instructional capacity.
3. Remain creative, open, and excited about student-focused primary source instruction.
4. Educate external partners about the Clements.
5. Establish an assessment program and reevaluate accordingly.

### **Strategies:**

1. Gather data about existing student experience and compare with internal objectives.
2. Encourage teaching staff to consider new pedagogies and methods.
3. Continue to build relationships with faculty and external partners, both new and existing.
4. Work to identify current optimal capacity for class visits and build staff capacity as needed.

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## **GOAL 3: PROFESSIONAL DEVELOPMENT**

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### **Goal:**

Clements Library staff will have the opportunity to engage in professional and scholarly organizations in their fields and will have the financial and organizational support to attend, network, gain skills and knowledge, or present work that increases awareness of the library and its holdings.

### **Objectives:**

1. Increase staff development opportunities.
2. Increase staff knowledge of opportunities.
3. Increase staff knowledge of available funding for professional development activities.
4. Increase staff activities in this area, including presentations, publications, and participation.
5. Sustain and grow where possible involvement in internal and external groups, organizations, conferences.

### **Strategies:**

1. Encourage staff who attend an event to report back to the group so that the knowledge can be shared throughout the organization.
2. Expand articles from the Quarto to other publications.
3. Find ways to supplement income with professional development related to the DEI initiative.
4. Establish peer mentoring/recognition programs within the library.

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## **GOAL 4: INSTRUCTION**

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### **Goal:**

Instructors at the University of Michigan and elsewhere will have a clear understanding of what resources the Clements can offer to their classes and will think of the Clements first when planning classes that intersect with our collections.

### **Objectives:**

1. Increase Clements exposure to diverse faculty/units/departments.
2. Increase partnership with other cultural institutions.
3. Increase collections processing for increased awareness.
4. Increase understanding of the value of engaged learning on campus.

### **Strategies:**

1. Compile metrics re: instruction and research activities.
2. Gather qualitative feedback from instructors and students.
3. Continue to identify and engage with other units.
4. Develop standard instructional modules that will streamline the process of planning for class visits.
5. Develop description strategies to increase discoverability beyond sending students to the online catalog.

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## **GOAL 5: COMMUNITY OUTREACH**

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### **Goal:**

Through community outreach the Clements Library will build authentic relationships with a variety of diverse constituencies, creating programs with them, and becoming a key partner in their work.

### **Objectives:**

1. Increase the ability of interested staff to participate in outreach.
2. Broaden diversity of staff and staff skill sets in engaging with stakeholders.
3. Expand creative ways of leveraging our collections to engage community members.
4. Build on university and donor partnerships.

### **Strategies:**

1. Invite new constituents to engage with new accessible technologies and online platforms (e.g., zooniverse).
2. Set parameters for staff participation in community outreach.
3. Work with people who can connect us to a broader audience.
4. Explore outreach mechanisms that are available with technology.

**Priority - Setting parameters around our limited resources, hoping that these parameters will expand over time.**

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## **GOAL 6: ORGANIZATION AND CULTURE**

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### **Goal:**

The Clements Library will foster a supportive institutional culture with a structure and processes in which staff feel valued and empowered.

### **Objectives:**

1. Establish clear institutional priorities that will drive staff work and culture.
2. Expand alternative funding sources that can support permanent staff.
3. Improve processing workflows.
4. Increase the sense that WCL is an inclusive/welcoming environment for a wider range of people.
5. Enhance staff compensation and professional development.
6. Expand and improve communication practices among staff.
7. Increase managers' responsiveness to staff input and solutions to known problems.
8. Increase bi-directional trust, both in the knowledge of staff and in the knowledge of management.

### **Strategies:**

1. Conduct an equity review, including review of classifications, job descriptions, and compensation levels.
2. Compile metrics of accomplishments/ disparities re: other units.
3. Utilize survey/feedback mechanisms.
4. Forecast and acquire space needed for staff and operations.
5. Seek to achieve a more desirable work environment, including:
  - a. Fair and equitable pay, and a clear and concise promotion process.
  - b. A more effective balance of institutional priorities, with opportunities for revision/adaptation as things change.
  - c. Improved communication across the board, including staying up to date on what others are doing, and being included in discussions that impact one's work.



- d. Greater clarity about decision making, with individuals being empowered to do what they need to do, balancing autonomy with accountability.
- e. Valuing collaboration, having the chance to do new things together, respect for each others' work, and frequent opportunities for reflection