



Diversity, Equity and Inclusion Strategic Plan Five-Year Strategic Objectives, Measures and FY20 Actions

I. Diversity Equity and Inclusion Strategic Plan: Overview

At the University of Michigan, our dedication to academic excellence for the public good is inseparable from our commitment to diversity, equity, and inclusion. It is central to our mission as an educational institution to ensure that each member of our community has full opportunity to thrive in our environment, for we believe that diversity is key to individual flourishing, educational excellence, and the advancement of knowledge.

Diversity: *We commit to increasing diversity, which is expressed in myriad forms, including race and ethnicity, gender and gender identity, sexual orientation, socio-economic status, language, culture, national origin, religious commitments, age, (dis)ability status, and political perspective.*

Equity: *We commit to working actively to challenge and respond to bias, harassment, and discrimination. We are committed to a policy of equal opportunity for all persons and do not discriminate on the basis of race, color, national origin, age, marital status, sex, sexual orientation, gender identity, gender expression, disability, religion, height, weight, or veteran status.*

Inclusion: *We commit to pursuing deliberate efforts to ensure that our campus is a place where differences are welcomed, different perspectives are respectfully heard, and where every individual feels a sense of belonging and inclusion. We know that by building a critical mass of diverse groups on campus and creating a vibrant climate of inclusiveness, we can more effectively leverage the resources of diversity to advance our collective capabilities.*

Rationale: *The Bentley Historical Library enables the future to the past. Its core mission is to collect, curate, and provide open and ready access to the records of the University of Michigan and historical collections associated with the peoples of the state of Michigan. This mission is grounded in our commitment to diversity, equity and inclusion.*

The Bentley is...

a premier historical archive. Authorized by the University of Michigan Board of Regents in 1935, the archive by now measures 74,869 feet and 135 terabytes of collections relating to the University of Michigan and the state of Michigan. These unique materials offer direct access to the past of these great, intertwined institutions from their founding dates on. The collections are available to the public to use in the beautiful reading room of the Bentley on North Campus, with its view out to a tranquil courtyard featuring the sculpture of renowned African American artist Richard Hunt. The collections are also increasingly available online through a robust digitization program that matches best practices in



Bentley Historical Library

preserving the past. Many of the newest collections arrive at the archives in digital formats and are thereby quickly available online after archival curation has occurred: these include over 2,300 University of Michigan and associations' websites that are captured and curated on a regular basis. The Bentley aims to strengthen all the more its collections—numbering over 11,000—as they relate to the history of race and diversity, gender and gender expression, immigration and migration, youth and aging, sexual orientation, disability and the rights of the disabled, faith and religion, and the military experience. In doing so, the Bentley starts from a place of strength already achieved by decades of identifying, curating, preserving, and enabling access to a multitude of collections mirroring Michigan's many communities, associations, and individuals from leaders including its modern governors to pioneers among women, the disabled, the LGBT, and minorities. As the University of Michigan archives, the Bentley is home to the collective biography of the university, with unparalleled depth in information about decisions and commitments by university administrators; course offerings, research, and academic debate from faculty; student advocacy and engagement in and beyond the classroom, including on the many playing fields that distinguish Michigan athletics; and staff involvement in core issues and developments across campus.

The Bentley is...

a team of archivists with an international reputation recognized by the Society of American Archivists (SAA) for being early adapters to change. They aim to solve some of the most challenging curatorial issues, to explore collaborations with faculty for improving the undergraduate's experience in the archive, and to invigorate and expand the collecting of historical materials from across campus and across the state of Michigan. The team of archivists in the Curation division of the Bentley is committed to setting a fast pace in order to accelerate access to the past as well as to reveal collections that previously may have been unknown or under-used due to inadequate description. They are motivated to make sources fully available on site and online as quickly as possible for a range of interests from scholarship, to informed decision making and debate, to casual curiosity. The Bentley team also includes Reference and Access archivists who are situated in the reading room, including at a new "consultation station," where they are dedicated to welcoming all visitors and helping them find their ways smoothly into the collections. Also on the team are Field archivists, who are seldom on site at the Bentley since their work frequently takes them across campus and across the state in negotiations and planning for the newest collections by being out in the community, engaging with records creators and potential donors in their offices and neighborhoods. Their practice is no longer to search for collections by following the obituaries in local newspapers or announcements of staff changes in the university; instead they engage with creators of content as the content is being created, with one successful effort being the ongoing archiving of #BBUM, from soon after its creation to now. A cohort of early-career Project Archivists also contributes to the energy of the Bentley across its divisions by, for example, engaging undergraduates in learning in the archives and by curating collections for ready access to such important chapters in history as the establishment of the UM Department of Afroamerican and African



Bentley Historical Library

Studies, the congressional careers of John Dingell and Carl Levin, and the presidency of James B. Angell, the UM president during whose tenure the first female student was officially admitted (in 1870).

The Bentley is more than a team of archivists. Its director, Dr. Terrence McDonald, is both a former dean of the university's College of Literature, Science, and the Arts and an award-winning scholar and teacher of urban political history. His lectures and other presentations based on the archives, on the history of the University of Michigan, uncover the institution's unknown past.

Also at the Bentley are an editorial director and communications specialist who produce print and online stories and news releases about the Bentley's collections and activities. The latest issue of the Bentley's magazine, entitled *Collections*, covers the story of Austin McCoy, whose collection at the Bentley documents his time at the University of Michigan as a Ph.D. student, postdoctoral fellow, and activist at the center of the United Coalition of Racial Justice, Being Black at the University of Michigan, and the 2014 Speak Out for Racial Justice event. *Collections* also reported most recently on the life of Blanche Van Leuven Browne, a disabilities advocate of a century ago whose records show how she opened doors for herself and hundreds of children under her care at the Van Leuven Browne Hospital School.

Two conservators manage a state-of-the-art laboratory for conserving paper, photographic, and print media; a sampling of their recent work relating to DEI includes the conservation of records from the Michigan Roundtable for Diversity and Inclusion, Arab-American community leader Aliya Hassen, Rabbi Sherwin T. Wine, and the Alpha Phi Alpha Fraternity, Epsilon Chapter.

Finally, the Bentley staff welcomes as many as two dozen University of Michigan students each year to work side by side as employees with archivists and conservators, learning current best practices and taking part in ongoing discussions around emerging ideas for access, curation, and conservation in the future.

The Bentley is...

a program of activities with the most frequent being over fifty University of Michigan classes per academic year that learn how to use the Bentley's historical collections to explore a wide range of topics including University of Michigan history, the history of Michigan's cities, Michigan citizens in wartime and unrest, migration and immigration, Michigan women in public life, and Michigan citizens engaged in the world through politics, research, commerce, faith, and military action. With a new position established in 2015 for an Academic Programs and Outreach archivist, engagement with students and faculty has intensified well beyond the traditional model among archives of "one orientation fits all." Faculty and students have now a "continuum of opportunities" to confer with the Academic Programs and Outreach archivist at any point during their use of the archives for classes.

Bentley Historical Library

Statement of Commitment

We value...

an active interest in the history of the University of Michigan and the state of Michigan with access for all. We value the Bentley as a living laboratory where a range of audiences—including students, faculty, journalists, historians, family researchers, authors, university officials, and more—can access the educative power of the past in order to better evaluate and impact the present. We value the role we can provide to the entire University of Michigan community by serving as its official archive.

We believe...

that enabling access for all to the history of our collective past as the University of Michigan community and citizens of the state of Michigan enriches our understanding of our unique stories and our collective heritages. Access to evidence of the past also informs social justice and accountability today. We believe that a diverse staff of archivists, conservators, administrators, student employees, and volunteers benefits from a variety of views and life experiences from among ourselves as colleagues as well as from the many communities we aim to serve.

We seek and collect...

historical archives that shed light on all communities who are a part of the University of Michigan or the state of Michigan. We strive to document the under-documented and to include in our scope of collecting a wide range of perspectives. As the University of Michigan archives, we curate and make available the historical records of decision makers. We also pledge to ensure a broad and deep representation of historical archives from faculty, staff, students, and alumni who have a rightful place in the legacy of the University of Michigan throughout its over two hundred years of history.

We create...

curated historical collections with access tools that enable search, discovery, and use including for topics of diversity; print and web publications that share “stories from the stacks;” opportunities for scholars from all over the world to conduct research at the Bentley through our Research Fellowship Program; and a research and learning environment on site and online that aspires to be welcoming to all.

We engage....

donors of collections and philanthropic donors in our efforts to build diverse collections and programs; scholars and students as we seek to expand the diversity of teaching and learning



opportunities; administrators and staff of the University of Michigan as we assist in finding answers to questions concerning past practices and decision making on the part of the university; and all staff, students, and volunteers of the Bentley Historical Library in our effort towards diversity, equity, and inclusion in our strategic planning and daily work.

II. Planning Process Used

Planning Lead Nancy Bartlett, Associate Director

Planning Teams

Education and Scholarship Domain:

Nancy Bartlett, Associate Director

Terrence McDonald, Director

Malgosia Myc, Assistant Director for Reference and Academic Programs

Cinda Nofziger, Assistant Archivist for Academic Programs and Outreach

Promoting an Equitable and Inclusive Community Domain:

Nancy Bartlett, Associate Director

Angela Clark, Business Administrator

Recruitment, Retention, and Development Domain:

Nancy Bartlett, Associate Director

Malgosia Myc, Assistant Director for Reference and Academic Programs

Brian Williams, Assistant Director and Archivist for University History

Service Domain:

Nancy Bartlett, Associate Director

Brian Williams, Assistant Director and Archivist for University History

Planning Process Summary, including Process used to Collect Data

The process that was used to collect data is a reflection of the size of our small unit, which numbers thirty-four regular staff members. We used the following activities:

staff and student employee forums

focus group discussions involving staff, student employees, and volunteers

staff meetings

consulting data in the form of catalog records and archival “finding aids”

consulting data and publications from the Society of American Archivists



Bentley Historical Library

In addition to data-generating activities undertaken for the first time as part of the DEI planning process, the process continues a number of recent efforts that predate the DEI initiative, having begun around the arrival in 2013 of the current director of the Bentley Historical Library, Terrence McDonald. Those efforts that have a direct and ongoing relevance include:

customer service training organized by ZingTrain in October 2014

strategic planning for the Bentley led by the Kardia Group in 2013/14

a redesign of the Bentley's website in 2014 using the services of Michigan Creative, with usability tested by TecEd in June 2015

the adoption in January 2015 of Aeon, which is automated request and workflow management software designed for special collections, libraries, and archives; this software enables online registration for researchers, their online requests of materials, and their online requests of duplication including digitization with resulting enhanced user experiences as well as data informing Bentley archivists about patterns of use of the collections

the implementation in 2015 of a five-year, provost-funded grant of \$760,000 for "Engaging the Undergraduate in the Archive"

Some of the planning has also complemented other synchronous initiatives such as the Bentley's involvement in planning for the University of Michigan Bicentennial in 2017 and the Bentley's launch of an early-career program for Project Archivists, begun in 2015.

Sources of data (e.g. Institutional data, forums, town halls, focus groups, interviews, surveys, committee reports)

Climate surveys of staff, student employees, and volunteers in fall 2016, fall 2017, winter 2017, and winter 2018

Data for the archival profession generated by the Society of American Archivists

Publications from the Society of American Archivists

Staff reports

Registration and circulation data generated by Aeon

Catalog and "finding aid" data

Bentley Research Fellowship files



Bentley Historical Library

Process used to analyze data

DEI planning committees, the Bentley's Lead Archivists, and Bentley administrative committee are holding ongoing meetings to analyze

Action idea generation activities

Bentley staff, student employees, and volunteers engaged in a total of five committees and multiple all-staff sessions to generate action ideas

Bentley Lead archivists and administrators have included action idea generation discussions in its regular monthly meetings starting in November 2015

Summary of engagement activities and implementation highlights for Year 3

The Bentley staff took part in training sessions relating to DEI in Year Three, including "Giving and Receiving Feedback" and "Straight Talk Training." There was also a DEI-focused presentation for Bentley staff, student employees and volunteers on the ongoing research project on the history of the African American student experience at the University of Michigan. Bentley project archivists organized and hosted an event for Bentley staff, student employees, volunteers and colleagues from MLibrary, the Clements, the School of Information, and the Gerald Ford Presidential Library on the origins of the Barack Obama Presidential Library as presented by guest speaker Stephen Booth. A national symposium was organized in November 2018 by Bentley archivists on the topic of Teaching Undergraduates with Archives. Over 200 archivists, faculty, and students from across the country registered for the symposium. Planning continues on the addition to the University of Michigan Detroit Observatory with construction to begin in 2019; the addition to the Observatory will afford greater access. Each of these activities heightened the Bentley staff's awareness of the importance of DEI and our ongoing commitment.

Summary of Year Three implementation, learnings, and key takeaways

Year Three Implementation was largely successful due to the strong commitment of staff and the intentional adapting of DEI priorities to core functions and ongoing priorities of the Bentley Historical Library.



Processes used to collect data or evaluate action items

Consultations with the Office of Services for Students with Disabilities were used to explore enhanced services for students with disabilities in their use of Bentley Historical Library collections and reference consultations;

Education and scholarship relevant to DEI relied upon structured exercises with UM students and interviews with faculty for analysis;

Results of a Bentley climate survey were implemented to optimize staff perceptions of the work environment;

Four internal committees made recommendations around compensation equity, social life of staff, the Project Archivist Program, and communication;

and a user survey of reading room services and overall experience was undertaken in winter 2018.

III. Data and Analysis: Key Findings

Summary of Data.

*Staff employment data illustrates that recruitment, retention, and development of staff have recently yielded a somewhat more diverse staff in terms of geographic origins and age distribution. There is a regrettably modest diversity profile for the Bentley regular staff, which is partly a challenge symptomatic of the American archival profession at large, as illustrated in Society of American Archivists data. In a 2005 census report on diversity in the American archival profession, fewer than 13% of the profession identified themselves as other than White/Caucasian. Bentley census now has improved beyond the SAA census, including one archivist who self-identifies as Asian-American, one archivist who is Puerto Rican American, and one archivist is Latina. Geographic origins of the Bentley's archivists are still mostly Midwestern, with a considerable range of origins within Michigan from the Upper Peninsula to northern Michigan, the west side of the state, and suburban Detroit. **Most recent recruitment and retention efforts have yielded an increase in diversity of staff in terms of race/ethnicity.***

Findings from Year Two implementation--which continue to be extremely important into Year Four and beyond--are that a search committee with greater mindfulness of DEI principles, and intentional inclusion of interview questions relating to the applicant's commitment to and understanding of DEI principles, can achieve progress in attracting a diverse pool of applicants for archival positions at the Bentley.

The establishment in 2015 of a much clearer promotion policy and procedures for promotion—through a new document for Bentley administration and archivists—has



Bentley Historical Library

led to advances among archivists who had previously lacked sufficient guidance. Census data from the Society of American Archivists indicates that a significant proportion of archivists in the United States enter the archival profession by first learning about archives by using them. This tendency along with the strong profile of academic archives ranking only second to governmental archives in types of employing institutions serve as motivation for the Bentley. The Bentley has an important role and opportunity in seeking greater diversity in its staff, and at the same time serving as an aspirational career goal to the diverse student population that is Michigan. Former student employees who are African-American and of Puerto Rican heritage are leading archivists or academic faculty in three major universities.

Given that leadership at the Bentley was entirely new as of 2013, there continues to be a keen interest in exploring and committing to leadership principles among the director, associate director, and assistant directors. This effort led in 2017/18 to a consulting firm that facilitated customized training and the discussion of appropriate principles. Diversity, equity, and inclusion figured significantly in this further development of leadership at the Bentley.

The leadership team at the Bentley has continues to realize greater strength in its goals and priorities through the past consultation with a consulting firm that provided customized training, including in the area of DEI.

The Bentley has made significant improvement in its goal of promoting an equitable and inclusive community by enhancing the visual communication of inclusion in reconfigured public spaces at the Bentley. The appreciation for this has been communicated anecdotally to the reference staff by a wide variety of visitors and was further affirmed in focus group discussions with UM faculty that occurred at the time of the architectural program research of Harley, Ellis, Devereaux. Changes include enhanced signage and a removal of all business processes away from the reading room in order to convey that that the public space is dedicated to public use. The improvement of public spaces for promoting an equitable and inclusive community is an ongoing commitment. Focus group discussions among staff, students, and volunteers in February 2016 yielded many suggestions for short-term and longer-term changes to undertake. The placement of reference archivists at a dedicated “consultation station” in the reading room has proven its concept by the very active dialogues that occur there between researchers and archivists. A particular emphasis and new practice are the personal welcome to all new researchers, especially all students since some in the past have expressed a sense of intimidation in entering an archive for the first time. With the adoption of Aeon as an online registration and requests system, the Bentley is able to analyze patterns of use of the collections. That tool and closer communication with faculty on course assignments helps archivists assist with greater precision any emerging needs of students in the reading room. Aeon also advances the Bentley’s understanding of use of the collections beyond impressions and anecdotes. For the first time there is precise data to illustrate, for example, that the Joe Louis scrapbooks at the



Bentley Historical Library

Bentley were among the most frequently consulted collections in 2018/19. The redesigned website for the Bentley is other evidence of our ongoing efforts to comply with ADA and to communicate an inclusive and equitable environment for all.

*Education and scholarship innovations through the provost-funded Third Century Initiative begin to address relevant published findings of the archival profession. These publications point out that very little research has occurred to inform archivists, and faculty, as to how best engage undergraduates in archival learning. It is due to these findings and the presence at UM of a strong cohort of scholars invested in “archival literacy” that the Bentley was able to launch its five-year program of seminars for faculty dedicated to the betterment of archival learning opportunities for students across campus. Just past the midpoint of its five-year program of seminars, the Bentley organized a national symposium in November 2018 on Teaching Undergraduates with Archives. **A volume of select presentations from the symposium will be published online and in print by University of Michigan Press in late 2019.***

Scholarship around the areas of diversity, equity, and inclusion occurs when relevant content in the archives is discovered. Bentley archivists are deeply committed to uncovering what might seem to be “hidden collections,” adapting methodologies deployed at Yale’s Manuscripts and Archives for a review of all catalog and finding aid descriptions.

In the domain of service, the Bentley performs a natural role on behalf of the University of Michigan. By serving as the university’s official archive, the Bentley enables access to important decision making, ideas, issues, events, and accomplishments on behalf of the university as a single entity. With the establishment of a formal records management program as of 2015, the Bentley is in an even stronger position to support the university’s efforts at careful stewardship of its records for the purposes of transparency and business intelligence that will inform decision making. Some of these records will ultimately become a part of the archive. As an example, the historical record of the Diversity, Equity, and Inclusion initiative is already anticipated, with archivist Aprille McKay continuing to remind units across campus about an eventual transfer of final reports.

The Bentley Historical Library realized a heightened visibility across campus and well beyond through its many partnerships, programs, publications, and services that have been provided throughout the Bicentennial celebrations and beyond.

Key Findings, Themes and Recommendations



IV. Strategic Objectives, Measures of Success and Action Plans*

**All strategic objectives and related actions will be pursued in accordance with the law and University policy.*

IV. A. Recruitment, Retention and Development

Constituency: Staff

Five-Year Strategic Objective 1: progress towards achieving a more diverse staff

Measures of Success: (for Objective 1): written policy in place, after review by University of Michigan Office of General Counsel, by 12/14/2019

FY20 Actions: continue to build out inclusive hiring policies

Primary DE&I Goal: diversity

Other applicable domain: inclusion

Constituency: Student employees

Five-Year Strategic Objective 4: progress towards achieving a more diverse team of student employees

Measure of Success (for Objective 4): written policy in place, after review by University of Michigan Office of General Counsel, by 12/14/2019

FY20 Actions: continue to build out inclusive hiring practices

Primary DE&I Goal: diversity

Constituency: Staff

Five-Year Strategic Objective 5: activating of leadership principles by director, associate director, and two assistant directors

Measure of Success (for Objective 5): ongoing communication to staff of leadership principles including their relevance to diversity, equity, and inclusion and strategies for conflict resolution

FY20 Actions: ongoing communication to staff of leadership principles and strategies for conflict resolution

Primary DE&I Goal: diversity

Constituency: Staff

Five-Year Strategic Objective 5: enhancing of career advancement strategies and skills for early career project archivists who hold two-year appointments at the Bentley Historical Library

Measure of Success (for Objective 5): successful engagement in professional activities such as workshops and an event with a visiting leader in the archival profession

FY20 Actions: inclusion of project archivists in a new boot camp orientation and advising of project archivists, including on the development of a program to organize and host a meeting for all staff with a visiting leader in the archival profession

Primary DE&I Goal: diversity and inclusion



Bentley Historical Library

Other applicable domain: equity

IV. B. Education and Scholarship

Constituency: Staff

Five-Year Strategic Objective 1: enhance the undergraduate learning experience in the archives
Measures of Success: (for Objective 1): Faculty evaluations; research conducted by PI's and a research fellow from Bentley, School of Education, and School of Information; successful production of online and print publication of select presentations from national symposium in November 2018 on Teaching Undergraduates with Archives

FY20 Actions: continuation of Third Century Initiative: Engaging the Archives; continuation of an MCubed Project entitled "Engaging the Archives: Researching Best Practices for Student Success in the Archives;" additional research to be conducted by a Bentley Historical Library Fellow in the Research Experience for Master's Students program organized by UM School of Information; preparing publication in fall 2019 of select presentations from national symposium on Teaching Undergraduates with Archives

Primary DE&I Goal: inclusion

Other applicable domain: diversity

Constituency: Staff

Five-Year Strategic Objective 2: enhance access through uncovering hidden collections

Measures of Success: (for Objective 2): greater description of collections relating to diversity, equity, and inclusion leading to increased discovery and use

FY20 Actions: archivists to continue a survey of existing finding aids and catalog descriptions by adapting methodologies deployed at Yale's Manuscripts and Archives

Primary DE&I Goal: diversity

Other applicable domain: inclusion

Constituency: Staff

Five-Year Strategic Objective 3: continue to create more inclusive classroom environments

Measure of success: (for Objective 3): positive evaluation from CRLT on inclusive classroom environment strategies

FY20 Actions: Continue to send material about accessibility to faculty and seek other ways to inform instructors and students about inclusion at the Bentley; develop, in consultation with CRLT, a post-class assessment tool that helps to measure a sense of inclusion in the classroom; bring together related units on campus to engage in collaboration around inclusive teaching practices within libraries, archives, and special collections

Primary DE&I Goal: inclusion

Other applicable domain: diversity

Constituency: Students

Five-Year Strategic Objective 4: continue to create more welcoming public spaces for students who are learning and researching at the Bentley



Bentley Historical Library

Measure of Success: (for Objective 4): an increase in areas which are available to students and welcome them

FY20 Actions: continue to create hallway and seminar room spaces that reflect student interests and demonstrate that students belong at the Bentley; continue to allow students the space to gather before class sessions begin, and seek other ways to welcome students to the library prior to and as they arrive, for example with email or other messages

Primary DE&I Goal: inclusion

Other applicable domain: diversity

IV. C. Promoting an Equitable and Inclusive Community

Constituency: Staff, student employees, and volunteers

Five-Year Strategic Objective 1: enhance overall visual cues of signage, displays, arrangement of furnishings to promote a sense of equity and inclusion at the Bentley for all visitors and employees

Measures of Success: (for Objective 1): evidence of DEI principles through the installation of new visual displays in public and work spaces based on input from an engaged staff, student employees, and volunteers

FY20 Actions: the installation of new visual displays in public and work spaces

Primary DE&I Goal: inclusion

Other applicable domain: diversity

Constituency: Staff, student employees, and volunteers

Five-Year Strategic Objective 2: enhance internal staff dynamics as they pertain to promoting an equitable and inclusive staff climate.

Measures of Success (for Objective 2): increased satisfaction among staff through actions taken to implement recommendations from four internal committees' work of winter 2018.

FY20 Actions: continue to implement findings from four internal committees focusing on compensation equity, social life of staff, Project Archivist Program, and communication.

Primary DE&I Goal: inclusion

Other applicable domain: equity

Constituency: Staff, student employees, and volunteers

Five-Year Strategic Objective 3: enhanced onsite accessibility for the benefit of staff, student employees, volunteers, and all visitors to the Bentley.

Measures of Success (for Objective 3): continuing communications about and use of services for students with disabilities

FY20 Actions: Bentley disability awareness committee to continue to confer with Office of Services for Students with Disabilities on communications and services and to participate in other meetings on campus and at professional conference sessions on accessibility

Primary DE&I Goal: inclusion

Other applicable domain: equity



Bentley Historical Library

Constituency: Staff, student employees, and volunteers

Five-Year Strategic Objective 4: educate our community on sexual harassment and misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive.

Measures of Success (for Objective 4): A safe and supportive environment, with educated provided to staff, students, and volunteers on sexual harassment and misconduct prevention.

FY20 Actions: Support unit-level participation in mandatory training.

Primary DE&I Goal: inclusion

Other applicable domain: equity

IV. D. Service (as applicable)

Constituency: Staff

Five-Year Strategic Objective 1: enhance records management and archival administration of the university's essential, historical records in order both to enable and enrich historical research by scholars, students, and the general public and to ensure access to the university's history of commitments and decision making for current and future administrators

Measures of Success: (for Objective 1): successful communications and consultations with university administrators

FY20 Actions: continue to operationalize records management program administered by the Bentley Historical Library

Primary DE&I Goal: inclusion

Other applicable domain: diversity

Constituency: Staff

Five-Year Strategic Objective 2: sustain the success of the University of Michigan Bicentennial in 2017

Measures of Success: (for Objective 2): the production of new knowledge through new histories of University of Michigan facilitated by the services and archives of the Bentley Historical Library; and the online launch and subsequent use of newly digitized collections including the historical records of the Department of Afroamerican and African Studies and the archival collection of UM President James B. Angell.

FY20 Actions: ongoing support to university units preparing and updating their histories, support to all programs and courses, and launch of online access historical records of the Department of Afroamerican and African Studies

Primary DE&I Goal: inclusion

Other applicable domain: diversity

V. Goal-related Metrics – School, college or unit measures tracked over time

Diversity: makeup of Bentley Historical Library workforce

Equity: internal climate survey results

Inclusion: number of participants in skill and cultural training opportunities

Demographic Composition:

Headcount

Race/ethnicity

Sex

Age (Generation cohort)

Climate Survey Indicators

Satisfaction with unit climate/environment in work unit

Assessment of semantic aspects of the general climate in work unit

Assessment of semantic aspects of the DEI climate in work unit

Feeling valued in work unit

Feeling of belongingness in work unit

Assessment of work unit commitment to diversity, equity, and inclusion

Perceptions of equal opportunity for success in work unit

Feeling able to perform up to full potential in work unit

Feelings of professional growth in work unit

Feelings of discrimination in work unit

VI. Action Planning Tables with Details and Accountabilities

VI. A. Recruitment, Retention and Development

Key Constituency	Strategic Objective	Measures Of Success	Detailed Actions Planned (measurable, specific)	Group/ persons accountable	Resources needed (if applicable)
Staff	Progress towards achieving a more diverse staff	Written policy in place by 12/14/19 after review by UM Office of General Counsel	Continue to build out inclusive hiring policies	Associate Director, Business Administrator	None
Staff and Students	Progress towards achieving a more diverse team of student employees	Written policy in place by 12/14/19 after review by UM Office of General Counsel	Continue to build out inclusive hiring policies	Associate Director, Business Administrator	None
Staff	Enhanced communication between staff, student employees, volunteers and Bentley leadership including director, associate director, two assistant directors, and business administrator	Ongoing communication to staff of leadership principles including their relevance to DEI for conflict resolution	Ongoing communication to staff of leadership principles and strategies for conflict resolution	Director, Associate Director	None

Staff	Enhancing of career advancement strategies and skills for early career project archivists who hold two-year appointments at the Bentley Historical Library	Successful engagement in professional activities such as workshops and an event with a visiting leader in the archival profession	Inclusion of project archivists in a new boot camp orientation and advising of project archivists, including on the development of a program to organize and host a meeting for all staff with a visiting leader in the archival profession	Associate Director	None
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IV. B. Education and Scholarship

Key Constituency	Strategic Objective	Measures Of Success	Detailed Actions Planned (measurable, specific)	Group/ persons accountable	Resources needed (if applicable)
Staff	Enhancing the undergraduate learning experience in the archives	Faculty evaluations; research conducted by PI's from Bentley, School of Education, and School of Information; successful production of online and print publication of select presentations from national symposium in November 2018 on	Continuation of Third Century Initiative: Engaging the Archives; Continuation of An MCubed Project entitled "Engaging the Archives: Researching Best Practices for Student Success in the Archives;" additional research to be conducted by a Bentley Historical Library Fellow in the Research Experience for Master's Students program organized by UM School of Information; preparing publication in fall 2019 of select presentations from national symposium on	Director, Associate Director, Archivist for Academic Programs and Outreach	None, funding secured through Third Century Initiative and MCubed

Bentley Historical Library

		Teaching Undergraduates with Archives	Teaching Undergraduates with Archives.		
Staff	Enhancing access through uncovering hidden collections	Increased description to enable discovery and use of collections	Systematic review of Bentley catalog records and archival finding aids, with additional description added where content relating to diversity, equity and inclusion is uncovered	Lead archivist for collections management	None
Staff	Continue to create more inclusive classroom environments	Positive evaluation from CRLT on inclusive classroom environment strategies	Continue to send material about accessibility to faculty and seek other ways to inform instructors and students about inclusion at the Bentley; develop, in consultation with CRLT, a post-class assessment tool that helps to measure a sense of inclusion in the classroom; bring together related units on campus to engage in collaboration around inclusive teaching practices within libraries, archives, and special collections	Archivist for Academic Programs and Outreach	None
Students	Continue to create more welcoming public spaces for students who are learning and researching at the Bentley	An increase in areas which are available to students and welcome them	Continue to create hallway and seminar room spaces that reflect student interests and demonstrate that students belong at the Bentley; continue to allow students the space to gather before class sessions begin, and seek other ways to	Archivist for Academic Programs and Outreach	None

			welcome students to the library prior to and as they arrive, for example with email or other messages		
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IV. C. Promoting an Equitable and Inclusive Community

Key Constituency	Strategic Objective	Measures Of Success	Detailed Actions Planned (measurable, specific)	Group/ persons accountable	Resources needed (if applicable)
Staff, students, and volunteers	Enhance overall visual cues of signage, displays, arrangement of furnishings to promote a sense of equity and inclusion at the Bentley for all visitors and employees	Evidence of DEI principles through the installation of new visual displays in public and work spaces based on input from engaged staff, student employees, and volunteers	Installation of new visual displays in public and work spaces	Director, Associate Director, Business Administrator, and Assistant Director and Archivist for University History	None
Staff, students, and volunteers	Enhance internal staff dynamics as they pertain to promoting an equitable and inclusive staff climate	Increased satisfaction among staff, student employees, and volunteers through actions taken to implement recommendations	Continue to implement findings from four internal committees focusing on compensation equity, social life of staff, Project Archivist Program, and communication.	Director, Associate Director, and Business Administrator	None

Bentley Historical Library

		from four internal committees			
Staff, students, and volunteers	Enhance onsite accessibility for the benefit of staff, student employees, volunteers, and all visitors to the Bentley	Continuing implementation of communications about and use of services for students with disabilities	Bentley disability awareness committee to continue to confer with Office of Services for Students with Disabilities on communications and services and to participate in other meetings on campus and at professional conference sessions on accessibility	Director, Associate Director, and Business Manager	None
Staff, students, and volunteers	Educate our community on sexual harassment and misconduct prevention in an effort to promote a safe and supportive environment for all members to work, learn, and thrive.	A safe and supportive environment, with education provided to staff, students, and volunteers on sexual harassment and misconduct prevention.	Support unit-level participation in mandatory training.	Director, Associate Director, and Business Manager	None

IV. D. Service

Key Constituency	Strategic Objective	Measures Of Success	Detailed Actions Planned (measurable, specific)	Group/ persons accountable	Resources needed (if applicable)
Staff	Enhance records management at UM by operationalizing a records management program	Successful communications and consultations with university administrators	Continue to operationalize records management program administered by the Bentley Historical Library	Assistant Director for University History	None

Staff	Sustain the success of the University of Michigan Bicentennial of 2017	Production of new knowledge through new histories of UM facilitated by the services and archives of the Bentley Historical Library; and the online launch and subsequent use of newly digitized collections including the historical records of the Department of Afroamerican and African Studies and the archival collection of UM President James B. Angell	Ongoing support to units preparing and updating their histories, support to all programs and courses, and launch of online access to historical records of the Department of Afroamerican and African Studies	Director, Associate Director, Assistant Director and Archivist for University History	None
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VII. Plans for Supporting, Tracking and Updating the Strategic Plan

The Bentley Historical Library established strategic priorities for the period 2014 - 2017 based on a series of six-month consultancy reviews by the Kardia Group in 2013/2014. With the introduction of the DEI five-year planning horizon, we have modified our strategic planning priorities, and intend to provide for updating the DEI plan as well as our strategic plan each year. With regard to tracking our progress on the plan, we will include DEI as an agenda item in our administrative committee meetings and in our monthly Lead archivists meetings as well as our monthly staff meetings. The agenda item will be informed by a dashboard tracking each strategic planning objective with its target completion date and person responsible, and whether the objective is on track or at risk. Focus of discussion in the administrative committee will be how to respond to objectives at risk. Response may include directing more collaborative resources to the objective, modifying the

objective, or tabling the objective if it no longer makes sense. **Nancy Bartlett, associate director, will be the key contact for the plan stewardship in FY20. Brian Williams will serve as a second implementation lead.**