

# **Equity and Inclusion Strategic Planning Process and Procedure Manual**

**Bureau of Equity and Inclusion**

## **Foreword**

This Procedure Manual presents general standards, policies, and procedures of the Bureau of Equity and Inclusion regarding the roles and responsibilities of Equity and Inclusion Professionals working in Wisconsin state government. Wisconsin has historically been a leader and pioneer in the fight for equality and equal opportunity. More can and must be done to ensure that the Wisconsin state government protects against discrimination, promotes diversity, and advances equity and inclusion. Individual and systemic racism, discrimination, and bias perpetuate and exacerbate disparities in access to economic opportunities, employment, education, housing, and health care. Equity and inclusion shall be the guiding principles and core values for every state workplace, program, activity, service, contract, and decision.

This manual is available on the DOA [\*Division of Personnel Management website\*](#).

*"Barriers to equity and inclusion adversely affects each agency's ability to fulfill the potential of its vision, mission, and goal."*

*McGinnis Lincoln, 2019*

*"Change will not come if we wait for some other person or some other time.  
We are the ones we've been waiting for.  
We are the change that we seek."*

*Barack Obama*

## **Table of Contents**

I	<b>Introduction</b>	1
II	<b>Enterprise Equity and Inclusion Programs, Reports, Policies and Training</b>	1
III	<b>Statutory and Rule Authority, Roles and Responsibilities</b>	4
IV	<b>Equity and Inclusion Plan Standards</b>	8
	<b>Phase 1: Preparation</b>	8
	<b>Phase 2: Plan Development</b>	10
	<b>Phase 3: Implementation</b>	14
	<b>Phase 4: Evaluation and Monitoring</b>	15
	<b>Phase 5: Reporting</b>	16
V	<b>Equity and Inclusion Plan Template</b>	17

## **I. Introduction**

The purpose of this manual is to provide information and expectations to advance equity and inclusion (EI) within Wisconsin state government agencies. This manual is not intended to be a comprehensive resource for all policies and their interpretations. Readers of this manual are directed to consult additional appropriate resources, statutes, and Employee Handbook Chapters as needed.

The Division of Personnel Management (DPM), Bureau of Equity and Inclusion (BEI) is committed to providing the support and resources necessary to assist state agencies in advancing equity and inclusion efforts, including cultivating a workforce that represents the diversity of talent and experience available to provide efficient, effective, and innovative services, and supports all Wisconsin's citizens.

## **II. Enterprise Equity and Inclusion Programs, Reports, Policies, and Training**

Equity and Inclusion programs are recruitment and hiring efforts that assist agency workforces in mirroring the overall labor pool of qualified candidates from which it draws its applicants. The recruitment and hiring efforts target qualified members of the labor pool who have historically been discriminated against because of race, gender, veteran, or disability status. There is a growing recognition that a diverse workforce is good business and adds a variety of experience, innovation, and perspectives, which increase the overall quality of work performed. A diverse, representative workforce in state government is reflective of the people it serves and represents. BEI monitors and reports on progress made in these areas.

### **1. Equity and Inclusion Programs**

- a. ***Enterprise Recruiting Program*** – BEI and the Bureau of Merit, Recruitment, and Selection (BMRS) staff coordinate participation in job fairs and engage in strategies to help create a diverse, highly qualified group of applicants (racial/ethnic minorities, women, veterans and persons with disabilities) for all positions.
- b. ***Equity and Inclusion Program Certification*** – In order to achieve statewide consistency in equity and inclusion programs, all Wisconsin state agencies must meet six eligibility criteria to attain and maintain EI Program Certification. It is the agency's responsibility to remain at the certified level at all times. EI Program Certification requirements are verified during agency monitoring visits conducted by BEI. *Certification requirements are currently being updated by BEI.*
- c. ***Expanded Certification Program*** – Expanded certification is a statewide affirmative action program used to address the issues of workforce underutilization. It ensures equal opportunity for racial/ethnic minorities, women, veterans, and persons with disabilities when they are substantially underutilized in the state workforce. The expanded certification program allows DPM and BMRS to include names of qualified women or racial/ethnic minorities, veterans, spouses of certain veterans, and persons with a disability to the certified list when appropriate. (See Chapter 212 – Certification Procedures, of the *Wisconsin Human Resources Handbook*.)
- d. ***Noncompetitive appointment for certain disabled veterans*** – Qualified veterans with a 30% or more service-connected disability is eligible for non-competitive appointment to permanent positions in classified civil service under s. 230.275, Wis. Stats.

- e. **Veteran Employment Plan of Action** – Appointing authorities for each agency are required to create and implement a plan to employ veterans, and veterans with service-connected disabilities, at a ratio equal to or greater than the state civilian labor force, as determined by the Wisconsin Council on Veterans Employment.
- f. **Wisconsin Student Diversity Internship Program** – The Student Diversity Internship Program places qualified, diverse students in intern positions within state agencies. This program assists state agencies in promoting equal employment opportunities by providing them with a pool of racial/ethnic minorities, women, veterans, and students with disabilities. The program provides students with practical, on-the-job experience, training, and exposure to employment with the State of Wisconsin.
- g. **Wisconsin Works (W-2) Program** – Each agency with more than 100 authorized permanent full-time equivalent positions must prepare and implement an annual plan of action to employ persons who, at the time of certification, receive aid or benefits from the state.

## 2. Equity and Inclusion Workforce Reports

BEI prepares and produces the following reports as required by federal and state statutes. Agencies are encouraged to use these reports to support equity and inclusion decision-making and planning related to recruitment, retention, and agency culture. Reports are published on the DOA [Division of Personnel Management website](#).

- a. **Classified Workforce & Affirmative Action Biennial Report** – This report fulfills the statutory requirements of s.230.04 (9)(e) and documents the demographic statistics of the permanent classified workforce and personnel transactions, including hires, retirements, and other separations from state service.
- b. **Demographic Quarterly Report** – This report provides workforce demographic data for each agency, which includes a demographical summary of employees by type, gender, ethnicity, age, seniority, and disability and veteran status.
- c. **EEO-4 Biennial Report** – The federal EEOC requires the state of Wisconsin to provide information on the workforce related to equal employment opportunity. The report summarizes race/ethnicity and gender data, occupational data, annual salary, new hires data, and data on employees who worked less than full-time.
- d. **State Council on Affirmative Action Annual Report** – This report summarizes the Council's activities and accomplishments, including highlights on the annual state Diversity Awards.
- e. **State Student Diversity Internship Annual Report** – This report summarizes program data for the internship program, including applicant statistics, agency participation, and position information.
- f. **Underutilization Analysis Biennial Report** – DPM is required to prepare this report to assist agencies with their equity and inclusion planning. This report documents the job groups underutilized by minorities and women.
- g. **Veterans Employment Annual Report** – Section 230.147 Wis. Stats. - requires DPM to prepare a veteran's employment report. This report summarizes veteran new hires and onboarding statistics for all state agencies.

- h. **Wisconsin Works (W-2) Annual Report.** Section 230.147 Wis. Stats. - requires state agencies with 100 or more full-time equivalent (FTE) positions to prepare and implement a plan to hire customers of the Wisconsin Works (W-2) program. This report summarizes the hiring data of certified W-2 employees by agency and classification title.
  - i. **Written Hiring Reasons Annual Report** - Section s.230.25 (1p), 230.21 (1m)(b) and 230.27 (2k), Wis. Stats. - requires DPM to prepare this report, which summarizes, for each agency, the appointing authority's reason(s) for new appointments, promotions, and project appointments.

### **3. Recruitment and Selection Process Requirements**

All positions are treated as underutilized for the purpose of recruiting. DPM, through a partnership between BEI and BMRS, will establish the methods and strategy to ensure vacancy opportunities are shared in the broadest and inclusive manner. Agencies will establish an internal process to ensure that EI staff are involved in the recruitment strategy at the agency level. The process may include quarterly meetings between EI staff and HR or regular review of recruitment efforts by EI staff. In the event the agency does not have dedicated EI support, this process may include additional involvement with BEI.

### **4. Equity and Inclusion Required Policies**

Equal Employment Opportunity (EEO)/Affirmative Action (AA) policies are established according to federal and state laws to prohibit discrimination and unequal treatment against any applicant or employee based on, but not limited to, race, ethnicity, color, national origin, ancestry, gender, age, disability, religion, creed, marital status, sexual orientation, political affiliation, and membership in the armed forces.

In order to ensure equal access to information, all EEO/AA policies and procedures must be readily available to all employees. The agency must post the EEO policies wherever and however necessary to provide employees notice of the policies and procedures and include agency Equity and Inclusion Officer (EIO) contact information. The current agency head must sign the EEO/AA Policy Statement. Whenever the head of the agency changes or there is a change in the content of the policy, this statement must be signed and reissued.

Agency equal employment opportunity and affirmative action policies must include the following elements:

- A commitment to equal employment opportunity for all persons, regardless of race, creed, ancestry, religion, color, gender, national origin, age, disability, arrest or conviction record, marital status, political affiliation, sexual orientation, or membership in the armed forces.
- A commitment to affirmative action efforts for racial/ethnic minorities, women, and veterans and persons with disabilities to ensure equal opportunity and to overcome the present effects of past discrimination.
- Procedures to handle complaints alleging discrimination and/or harassment. The policy statement must give information regarding where these procedures are published and must identify the contact person.
- Policies and procedures must be accessible on the agency's intranet, internet, and/or shared drive to ensure accessibility by all employees regardless of work location.

### **5. Equity and Inclusion Required Training**

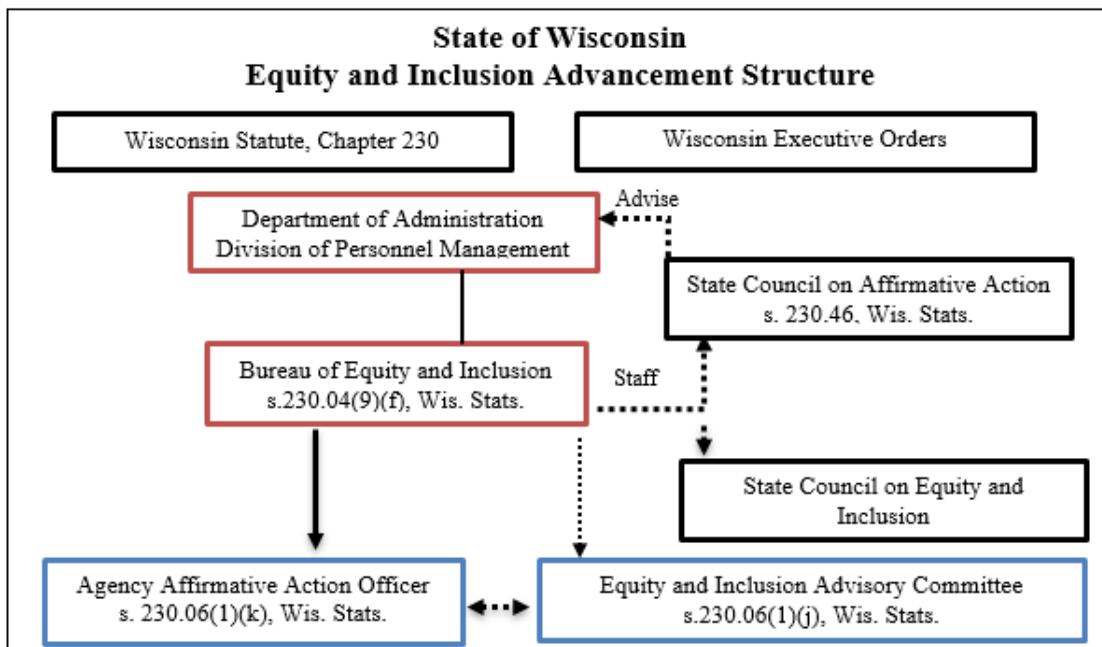
- a. **Equity and Inclusion Employee Training** – BEI offers training that is customized Diversity, Equity, and Inclusion education and skill development opportunities upon request by a state agency.

- b. **New Supervisory Training** – Provided jointly by the four bureaus in the Division of Personnel Management (BEI/BCC/BTD/BMRS), the new supervisor training is basic management/personnel administration training designed to meet the statutory training requirement. The EI portion highlights the equity and inclusion roles and responsibilities, EEO/AA basic laws, policies, and concepts.

### **III. Statutory and Rule Authority, Roles and Responsibilities**

Statutory and rule authority dictates the responsibility of the DPM Administrator to establish and promulgate personnel rules, standards, and procedures to ensure equity and inclusion throughout the state civil service system; specifically, Wisconsin Administrative Code, Chapter Employment Relation (ER) 43; Wisconsin Statute 230; and Wisconsin Human Resources Handbook Chapter 800.

As part of the agency's efforts to ensure equal employment opportunity to all individuals, Wisconsin state statutes delegate authority, roles, and responsibilities accordingly to achieve equity and inclusion in each state agency. Listed below are the roles and responsibilities of those who oversee and implement affirmative action, equity, and inclusion for Wisconsin state government.



#### **Division of Personnel Management Administrator**

The Administrator has the ultimate responsibility to ensure affirmative action, equity, and inclusion throughout the Wisconsin state government merit civil service system. The Administrator:

- Promulgates appropriate rules, policy procedures, and principles to ensure equity and inclusion throughout the Wisconsin state government merit civil service system.
- Establishes the standards for agency equity and inclusion policies, procedures and plans, and provides training and technical assistance as necessary.
- Reviews and approves/disapproves of any equity and inclusion plan prepared by an agency to ensure compliance with the standards established.
- Prepares and submits an annual EI report to the Governor and the Legislature.

## **Bureau of Equity and Inclusion (BEI)**

BEI is the central equity and inclusion office for Wisconsin state government. The BEI:

- Engages and collaborates with agency leadership and agency HR Directors, EI Officers, EI Professionals, and agency Equity and Inclusion Advisory Committees (EIAC) to advise and support the development, planning, and implementation of EI Plans.
- Establishes standards, support mechanisms, training, and resources to ensure consistency in the development, implementation, and progress of agency equity and inclusion plans.
- Increases leadership and employee collaboration and engagement opportunities to help cultivate a culture that utilizes an equity and inclusion lens throughout the full cycle of recruitment and retention activities.
- Develops and utilizes workforce metrics, data, and tools to guide and inform strategic decision making, and conducts a regular analysis of data for trends and continuous improvement opportunities.
- Develops and maintains relationships with ethnic, minority, and disability groups and organizations to promote state recruitment, networking, and outreach efforts to recruit diverse candidates.
- Develops and coordinates centralized educational, learning, and development opportunities for all employees (including collaborating with agency SME's to facilitate training offerings) with a separate track for executive agency leadership.
- Integrates equity and inclusion in supervisor and leadership training offerings, including establishing equity and inclusion competencies and training resources that will help equip supervisors and leaders to cultivate a culture of equity and inclusion.
- Reviews and evaluates current equity and inclusion programs, policies, and reports to identify barriers and opportunities for improvement where necessary.

## **Agency Appointing Authority (Agency Secretary)**

The state agency appointing authority carries the overall responsibility for establishing an Equity and Inclusion Program, including goals, timetables, and compliance with all federal and state laws and regulations. The Appointing Authority:

- Communicates the direction and vision to agency leadership that ensures involvement and commitment to the agency's equity and inclusion efforts.
- Develops an equity and inclusion action plan to implement strategies that will comply with affirmative action and equity and inclusion requirements, builds infrastructure and culture committed to equity and inclusion, and incorporates equity and inclusion throughout the agency's work and public service.
- Engages a representative employee and stakeholder group in the planning and development process for the EI plan to review equity and inclusion related data, recommend opportunities for improvement, and provide support and shared ownership of agency strategies and desired outcomes.
- Ensures that designated personnel responsible for equity and inclusion efforts and programs are given the necessary authority, top management support, and resources to implement their assigned responsibilities successfully.
- Assesses and ensures internal workplace policies and procedures are equitable, culturally responsive, and promote inclusion.
- Provides professional development opportunities and resources that raise awareness, build knowledge and understanding, and encourage and promote an inclusive culture.
- Seeks advice and guidance from the Equity and Inclusion Advisory Committee on agency EI programs, initiatives, and policies.

## **Equity and Inclusion Officer**

The Equity and Inclusion Officer (EIO), or designee as delegated by the EIO, is directly responsible for developing, coordinating, and implementing the agency's EI plan. The Equity and Inclusion Officer:

- Plans, guides, and advises the appointing authority and executive leadership in establishing and maintaining equity and inclusion plans, programs, and policies. This includes engaging the appropriate individuals and stakeholders throughout development and implementation, and continuous improvement activities of plan actions.
- Coordinates, develops, and implements equity and inclusion initiatives that support the agency's equity and inclusion plan goals.
- Keeps the agency head and agency leadership at various organizational levels informed of EI developments, progress, and potential concerns.
- Ensures communication and dissemination of equity and inclusion plan, policy and program information and employee access to the plan and related policies.
- Works with leadership to identify, coordinate, facilitate and/or provide equity and inclusion training to increase awareness, support, and maintain compliance.
- Establishes and maintains internal monitoring, auditing, and reporting system to measure the effectiveness of the agency's programs and activities to ensure compliance with state and federal requirements. This includes gathering, researching, and analyzing data.
- Audits hiring and promotion patterns and the selection of candidates for career development and training programs to remove barriers.
- Ensures agency selection criteria are objective, uniform and job-related, and that personnel decision-making processes adhere to EEO and AA principles.
- Promotes and coordinates agency participation in enterprise equity and inclusion programs and initiatives, including the State Student Diversity Internship program, the annual state Diversity Awards, the non-competitive appointment for certain disabled veteran's program, W-2 program, the disabled veteran's program, etc.
- Serves as the agency's point of contact for professional organizations and community groups to promote and assist with employment opportunities for underrepresented groups.
- Attends at least 12 hours of equity and inclusion and agency supervisory training annually.
- Participates in and advises the agency's Equity and Inclusion Committee as a non-voting member.

## **Equity and Inclusion Designee/Professional**

The designee/professional is responsible for assisting with the implementation of the equity and inclusion plan efforts within their agency. The EI designee/professional:

- Ensures dissemination of all relevant equity and inclusion information to appropriate staff.
- Reviews policies, procedures, and practices, and recommends changes to the EIO.
- Assists in development, implementation, and management oversight of policies, programs, and procedures for the administration of EI efforts for the agency.
- Assists with the promotion and coordination of agency equity and inclusion programs and initiatives, including the State Student Diversity Internship program, the annual state Diversity Awards, the non-competitive appointment for certain disabled veteran's program, W-2 program, the disabled veteran's program, etc.
- Ensures communication and dissemination of equity and inclusion plan, policy and program information, and employee access to the plan and related policies.
- Assist the EI Officer in conducting periodic audits of recruitment activity to measure the effectiveness of efforts and activities to attaining strategic equity and inclusion goals and objectives.
- Attends equity and inclusion and agency supervisory training annually.

- As designated, manages the agency's medical issues. This may include coordinating and monitoring the agency's FMLA and reasonable accommodation requirements to ensure compliance with the American with Disabilities Act (ADA).

### **Executive HR Manager/HR Manager**

The Executive HR Manager/HR Manager is responsible for ensuring equitable and consistent administration and application of all personnel policies and provides direct supervision of the EI Officer and EI professionals. The Executive HR Manager/HR Manager:

- Maintains effective working relationships with agency EIO officers and designees.
- Provides leadership to HR staff and others to ensure personnel decision-making processes adhere to affirmative action, equal opportunity, and equity and inclusion principles.
- Ensures the hiring managers and supervisors work effectively with the EIO to develop and execute the EI plan.
- Provides the EIO the support and data necessary to perform duties and responsibilities related to equity and inclusion.

### **Equity and Inclusion Planning and Development Team**

The EI planning and development team is a representative group of agency employees selected by the appointing authority to assist with the planning and development efforts for the equity and inclusion plan. The EI Planning and Development Team:

- Reviews equity and inclusion related data, gathers additional data as needed, recommends opportunities for improvement, and provides support and shared ownership of agency strategies and desired outcomes.
- Establishes a plan for regular communication regarding the EI plan process, activities, and outcomes to build transparency, broad participation, and support.

### **Agency Equity and Inclusion Advisory Committee (AEIAC)**

The AEIAC is required for agencies that employ 50 or more employees. The AEIAC:

- Advises the appointing authority on affirmative action, equal employment opportunity, and inclusion issues impacting the agency.
- Reviews equity and inclusion related policies, procedures, and practices, and recommends positive solutions to ensure equal opportunities for current and potential employees.
- Promotes the recruitment, hiring, retention, and advancement of diverse staff.
- Recommends, develops, and/or sponsors activities, programs, and training that promote diversity, equity, and inclusion, and encourages personal growth.
- Promotes and champions EI plan, goals, and activities to department staff.
- Educates and raises awareness among committee members themselves, so they may role model and champion diverse perspectives and inclusive behaviors within their agency.
- Discusses, communicates, and creates collaborations in ongoing and upcoming initiatives and events that support the goal of enhancing the environment for diversity, inclusion, and equity across the agency.

### **Equity and Inclusion Professional Committee**

The Equity and Inclusion Professionals Committee consists of EI professionals from all state agencies. The committee:

- Advocates for the adoption of policies, management practices, and programs that encourage and support the active recruitment and retention of racial/ethnic minorities, women, veterans, and persons with disabilities.
- Provides agency perspectives and recommendations to BEI with respect to matters involving affirmative action, equal employment opportunity, and workforce diversity programs and services.

## **State Council on Affirmative Action (SCAA)**

The Council is appointed by the Governor and legislative leaders to advise the Administrator of the Division of Personnel Management with an overall purpose of fostering measurable progress towards an equitable, inclusive, and diverse workforce in state government. The Council:

- Assists and advises state agencies and government officials regarding the development and implementation of agency equity and inclusion action plans aimed at promoting affirmative action, equity, inclusion, and diversity in state government.
- Facilitates strategies for agencies to reach diverse candidates, including developing tools to measure the effectiveness and integration of equity and inclusion into full-cycle recruitment and retention initiatives.
- Champions and advocates for the state's equity, and inclusion initiatives, policies, and programs.
- Develops communication channels and networking opportunities with organizations that represent protected groups to ensure that information about the state's employment opportunities is widely disseminated.
- Evaluates the progress of affirmative action, equity, and inclusion programs throughout the civil service system and provide suggestions for continuous improvement or recommendations of best practice and promising initiatives or programs.
- Submits a report at least once per year to the Governor and the Legislature on actions and activities to support DPM EI advancement of affirmative action in civil service.

## **IV. Equity and Inclusion Plan Standards**

All state agencies with 30 or more permanent classified employees are required to develop a three-year equity and inclusion plan that outlines the steps taken to comply with equal employment opportunity and affirmative action requirements which include building infrastructure and culture committed to equity and inclusion, and a workforce reflective of the available labor market of the communities served. This section outlines the standards agencies are expected to follow when developing the Equity and Inclusion Plan, which includes:

**Phase I: Preparation**

**Phase II: Plan Development – Set Goals, Strategies, Metrics**

**Phase III: Implementation of Plan**

**Phase IV: Evaluation and Monitoring**

**Phase V: Reporting**

**Phase I: Preparation**

***Estimated Time to Completion: 3 months***

### **1. Form Planning and Development Team**

Agencies will engage a representative employee and stakeholder group in the planning and development efforts to review equity and inclusion related data, recommend opportunities for improvement, and provide support and shared ownership of agency strategies and desired outcomes. It is not the size of the team, but the effectiveness of the team(s) to engage, plan, develop, and communicate to staff and stakeholders the "Why," "What," and "How" the agency plans to advance equity and inclusion. This includes external subject matter experts, Affirmative Action Advisory Committee (AEIACs)members, Diversity Committee members, Training and Employee Development staff, Wellness Program staff, supervisors, managers, and employees, during various stages of the planning and development. The BEI team will work with agencies as necessary to ensure the development of teaming structures that support

the work required of the agency and the initiatives. The plan will identify employees and stakeholders involved in the development of the plan.

**a. Map out planning process**

- Work with agency leadership to develop a workplan and timeline that will support the work of the planning team and organize and launch the planning process.
- Develop a coordinated timeline to ensure that steps are being taken in the needed sequence to achieve goals. A timeline will also help maintain consistency and transparency in communicating the progress toward goals and shared understanding of the work.

**b. Consult with the Bureau of Equity & Inclusion staff**

- Consult with BEI to learn more about the support offered for this process and practices that have been beneficial to other agencies, and to access information on subject matter experts and community resources.

## **2. Underutilization and Workforce Analysis**

Prior to instituting an equity and inclusion plan, an agency must evaluate whether it is past or present practices that have contributed to under-representation in any segment of the workforce of protected groups with a specific focus on recruitment, retention, and culture. This step will help create a better understanding of the current state of equity, inclusion, and diversity in the agency and support the identification of goals and priorities.

Agencies will conduct an analysis of their workforce which includes, but is not restricted to, an assessment of personnel policies, procedures, recruiting, hiring and advancement practices and data, existence and status of past goals, customer and employee experience of being welcomed and respected in the organization, and the identification of equity and inclusion barriers and opportunities for improvement. Agencies will develop a summary of the analysis findings and resulting agency implications. This information will be used to develop the agency equity and inclusion plan.

**a. Data Collection and Analysis**

- Assess equity and inclusion related reports mentioned in this document under the Enterprise Equity and Inclusion Programs, Reports, Policies, and Training section, Page 1 of this document.
- Assess applicant flow statistics for past job openings. This review may reveal problem areas in recruitment, testing procedures, hiring, etc. Engage outside subject matter experts in this process.
- Assess recruitment files, which include recruitment activity plans, interview questions, benchmarks and notes, employment justification letters, and a list of exam raters and interviewers.
- Assess applicant sourcing. This review will identify gaps and ineffective recruitment platforms for targeted groups and enable open discussions and opportunities to build more effective recruitment relationships.
- Assess development efforts for current employees. This conversation will address gaps in opportunities and engage the training team in identifying more relevant agency-specific opportunities for staff.
- Assess student diversity intern program feedback. If not participating in a student diversity program, consider how to participate.
- Assess personnel transaction statistics. If racial/ethnic minorities, women, and people with disabilities are receiving a lesser percentage of reclassifications and promotions, or a greater percentage of discharges and layoffs than might be expected from their percentages in the workforce, it might be an indication of problems which need attention.

- Assess voluntary separations in as many disaggregated options available. If the review indicates a problem of retention of racial/ethnic minorities, women, and people with disabilities, prioritize areas of concern and discern barriers.
- Assess discrimination complaints and grievances over the past few years to identify trends and possible causes. The analysis may reveal the need for new or revised policies, procedures, or supervisory training, and provide a basis for measuring improvement.
- Assess all permanent and probationary terminations of racial/ethnic minorities, women, and people with disabilities. Where inequalities exist, develop retention strategies to address and measure.
- Review analysis of the job group, and underutilization tables and results from any other analysis tools used.
- Review the results of any employee engagement surveys, focus groups, or trends identified in the core review areas of recruitment, retention, and agency culture.

**b. Consultation with Employee Groups (not an all-inclusive list)**

- Agency Equity and Inclusion Advisory Committees (AEIACs) – What are their current issues, concerns, and activities?
- Training and Employee Development staff – How are they addressing the training and development needs of staff on issues of equity and inclusion? This includes how they measure effectiveness, include SME and staff in the development of training and professional development opportunities, and how they train and support leadership on the impact of policies and procedures, etc.
- Agency Wellness Champions – What is the impact of the Wellness program on recruitment, retention, and agency culture? How are agencies using and promoting the Employee Assistance Program (request demographics of employees using the program, and services used by employees)? What barriers to participation exist?
- Supervisors – What harassment/discrimination issues have developed in the work units? How have they been addressed, and what was the outcome? What needs to be done to support supervisors in this area?
- Staff – How are employees being impacted by equity and inclusion related policies, procedures, practices, and activities?

NOTE: A written summary of the workforce analysis is required as part of your equity and inclusion plan, as described in the sections to follow.

## **Phase II: Plan Development**

***Estimated Time to Completion: 3 to 6 months***

The Equity and Inclusion Plan will be developed based on the workforce analysis findings and will describe the strategies and actions intended to affirmatively advance equity and inclusion in the core areas of **recruitment, retention, and agency culture**. Development sample documents are attached for reference and guidance purposes. All equity and inclusion plans must include the following elements:

**1. Title Page**

**2. Acknowledgments**

- Signatures of your Appointing Authority and Equity and Inclusion Officer
- Date of Submission of Plan to BEI
  - Agency Leadership
  - Planning and Development Team Members
  - Stakeholder/contributors and other subject matter experts consulted

- Report writers – Authors, cover design, graphs, and charts, etc.

### **3. Commitment Letter**

- Include a letter of agency's commitment to equity and inclusion. (Example Commitment Letter- **See Appendix #1**)

### **4. Individuals responsible for Directing/Implementing the Equity and Inclusion Plan**

- Provide the roles and responsibilities along with contact information of those responsible for directing/implementing the EI plan. Roles and responsibilities for individuals under Statutory and Rule Authority, Roles, and Responsibilities section, Page 4 of this document, maybe inserted for this section.

### **5. Introduction**

- Explain how equity and inclusion efforts align with the agency's Vision, Mission, and Values.
- Frame the importance of equity and inclusion to the agency in the core areas of recruitment, retention, and agency culture.
- Summarize the process for EI plan development and timelines for implementation.
- Describe how stakeholders provided input and the importance of their contributions to plan development.
- Describe how the planning and development team, SMEs, and stakeholders participated in the development of the agency's plan.

### **6. Workforce Analysis Summary**

Prior to instituting an equity and inclusion plan, the agency will evaluate whether it is past or present practices that have contributed to under-representation in any segment of the workforce of protected groups. The agency will summarize the results of the workforce and underutilization analysis, which includes an assessment of personnel policies, procedures, recruiting, hiring and advancement practices (**as outlined in Section IV (2)**), which includes, but is not limited to, the following:

- Qualitative and quantitative reflections on the agency's current strengths, challenges, barriers, opportunities for improvement, and needs to advance diversity, equity, and inclusion in the workforce and culture.
- Explanation of how the data for the analysis was gathered in the areas of recruitment, retention, and agency culture and the process used to identify and prioritize areas for improvement. Use enough detail to convey the nature and scope of the problem.

Note: It is not necessary to include the actual charts and analysis tables used in the analysis in the submission of the EI Plan. As a best practice, keep charts and analysis tables handy for further reference or include them as an appendix to the EI Plan.

### **7. Overarching Goals and Strategies (appendix 3a)**

Each agency should identify broad goals from its workforce analysis to address barriers in the advancement of equity and inclusion in each of the equity and inclusion focus areas (Recruitment, Retention, and Agency Culture). Once those goals are identified, the agency planning, and development team will identify strategies to address the barriers. Each strategy chosen is included in the agency EI workplan.

#### **a) Goals**

Agency goals are the cornerstone of the agency's equity and inclusion framework and create the decision-making platform for identifying priorities within the agency. Each

agency should identify overarching goals in the areas of **recruitment, retention, and agency culture**. These goals should reflect the agency's commitment to advancing equity, diversity, and inclusion and align with the agency's vision, mission, and values.

Identify the feasibility of the goal(s), the benefits of the goal(s) if accomplished, and the ability to build on its success. When setting goals, one tool to consider is the SMART Goal framework. **SMART Goal** is an effective tool that provides clarity, focus, and motivation to achieve **goals**. It can also improve the ability to reach agency goals through clarity and determining a completion date. If you are setting "SMART" goals, they should be:

- **Specific** – Goals that state precisely what you are going to do, for whom, and to what end.
- **Measurable** – Goals that are measurable so that the agency can track progress and have tangible evidence that you accomplished what you set out to do. How much? How many? How can it be counted?
- **Attainable** – Goals that are achievable providing for a level of challenge or growth that is aspirational, yet one that the agency believes is reachable.
- **Relevant** – Goals that connect with the overall mission and vision of the agency.
- **Time-bound** – Goals that place the effort on a timeline, connected with other activities and benchmarks, and move the work toward completion.

Example goals could be:

- Increase the recruitment of racial/ethnic minorities, women, and people with disabilities.
- Ensure that the agency's commitment to diversity is clear, transparent, and evident at the highest levels of and across the agency.
- Increase retention rates among diverse staff by cultivating a work environment that encourages inclusion and acceptance, whereby ultimately enabling individuals to contribute to their full potential.
- Develop and implement equity and inclusion training modules for all supervisors and managers.
- Conduct an annual employee engagement survey of the employees to assess progress on cultivating a work environment that welcomes and respects diversity.

### b) Strategies to Achieve Goals

Implementation strategies drill down to the specific efforts necessary to achieve goals. The strategies are 'how' the goals are attainable. Example strategies include:

- Review all agency communications (including web, social media, advertising, letters to current and prospective students, early-alert emails, etc.) to ensure that communications are free of bias and that the agency commitment to equity and inclusion is not only explicitly stated, but evidenced by images, points of pride, and lists of agency strengths and priorities.
- Enhance training on cross-cultural communication and an inclusive workplace for all our employees, especially managers.
- Establish relationships with community-based organizations as a means to reach prospective employees.

## 8. Equity and Inclusion Strategic Workplan (Appendix 3B)

The workplan represents the detailed actions for each strategy in the agency EI Plan. Each area of the workplan should be complete and provide detailed information about the actions to achieve the strategies, measures of progress, outcomes, and measures of success, clear roles and responsibilities, and a timeline for completion.

**a) Focus Area Strategies: Recruitment, Retention, and EI Culture**

Each strategy identified to meet an agency's equity and inclusion goal in the focus areas of recruitment, retention, and agency culture is listed on the workplan. The actions identified to achieve that strategy are listed and described. Each action implemented is part of the process to achieve a specific strategic outcome. The comprehensive selection of actions to support the strategy may be short-term or long-term actions expanding over the EI plan 3-year period.

**b) Key Performance Indicator – Measure Progress**

A key performance indicator (KPI) is a metric used to gauge and drive performance improvement efforts. KPI's gauge the progress of the actions taken to reach the desired outcome. KPI's provide clarity to the process for reaching the short-term and long-term goals and allow teams to focus on efforts that fall short and require attention immediately to stay on track. KPI's support the monitoring and continuous improvement activities of the strategic plan.

**c) Outcomes and Metrics**

- 1) Outcomes are the desired result from the implementation of a specific action. Each action taken is designed to produce a specific outcome that supports the completion of the strategy chosen to reach the agency desired EI recruitment, retention, and agency culture goals.
- 2) Metrics are the information that is tracked and measured to determine the degree or level of progress made towards a planned or expected outcome. It is important to identify the metric unit in the measure (e.g., percentage, numerical, unit of time). Metrics can be used to measure a qualitative result (i.e., a 5% increase in satisfaction). Examples of measurable outcomes include:
  - a. Increase the recruitment of racial/ethnic minorities by x%, women by x%, and people with disabilities by x% based on previous year application statistics and trends identified from the previous two years.
  - b. Based on the 2018 engagement survey results, increase the percentage of employees reporting that they feel comfortable or very comfortable discussing career options with their supervisor by x% yearly.
  - c. Reduce the number of harassment complaints by 10 % annually.
  - d. Reductions in absenteeism for underrepresented groups when an effort is put into fostering an inclusive culture for everyone.
  - e. Increased representation of racial/ethnic minorities at different levels of the agency year over year.

**d) Responsible Staff/Office**

Identify the individual(s) (i.e., name, title) responsible for completing or ensuring the completion of the action item(s).

**e) Targeted Completion Date**

Establish a date of completion for each strategy. For those activities that are ongoing, indicate "ongoing activity" and the date the action item was initiated.

**f) Training**

Outline the associated training that will be provided and made available to build awareness, knowledge, and skills to normalize equity and inclusion practices and principles in the agency culture for each focus area.

**9. Review and Approval**

- Review the final draft of the plan with the development and implementation team and agency leadership. This will assist the final editing process and clarification of any strategies, goals, and metrics.
- Submit your plan for approval to the Bureau of Equity and Inclusion. BEI will review and approve your plan within 60 days of receipt.

**Phase III: Implementation of Plan**

***Estimated Time to Completion: 3 months***

**1. Communication and Dissemination**

Develop an internal and external communication plan for sharing the EI plan with the workforce and external stakeholders. The EI Plan should explain the methods the agency will take to communicate and disseminate the plan. Methods that meet plan standards and EEO/AE policy dissemination requirements include, but are not limited to:

**a. Internal Communication**

- Memo/letter sent to all employees
- Display on agency intranet and social media site
- Disseminate and review the information during new employee orientation sessions
- Reinforce policy and agency commitment during training, agency staff meetings, and meetings with managers and supervisors

**b. External Communication**

- Display on the agency's public website
- Send policy notices to community organizations
- Share policies with community leaders, colleges, and universities
- Include a commitment to equal employment opportunity statement in procurement contracts

**2. Launch**

Ensure follow-through and oversight of all parts of the plan. This includes:

- Sharing your plan and successes with your entire agency and external stakeholders.
- Scheduling regular check-ins between the team/individual(s) monitoring the plan's progress, divisional leadership, and HR staff.
- Establishing a tracking mechanism for the resources developed and used in order to fulfill the goals set for your agency. Examples include new data gathering tools or surveys, professional development, staffing changes, etc.
- Contacting BEI for ongoing support as needed.

## **Phase IV: Evaluation and Monitoring**

***Estimated Time to Completion: 3 months***

### **1. Agency Monitoring**

All agency plans will establish and describe a systematic process for monitoring, evaluation, and oversight of the plan. Methods that meet policy monitoring requirements include, but are not limited to:

- Monitoring records of all employment activities to include hires, applicant flow data, transfers, promotions, terminations, discipline, compensation, training, and career development programs at all levels of the agency.
- Monitoring imbalances in the workforce with respect to minorities, women, veterans, and individuals with disabilities.
- Requiring internal reporting by organizational units on a scheduled basis to assess the degree to which plan objectives are being met.
- Reviewing workforce data and reports with all levels of management.
- Reviewing the hiring manager's participation in equity and inclusion training.
- Tracking and reviewing discrimination and harassment complaints, including trends, circumstances, decrease/increase, and resolutions.
- Tracking and reviewing retention issues, i.e., upward mobility for underrepresented group members.
- Reviewing the progress made to ensure access for individuals with disabilities.
- Advising agency leadership of plan effectiveness and making recommendations to modify and/or improve performance where necessary.

### **2. BEI Support & Monitoring**

Wisconsin Statute §230.04 (9)(f), and Wisconsin Administrative Codes (s. ER 43.05) require BEI to monitor and evaluate the affirmative action efforts of state agencies on an ongoing basis. BEI will support and monitor agency progress to ensure equity and inclusion for employees and applicants through:

#### **a. Support**

- Providing the necessary agency data and reports to conduct the workforce analysis.
- Providing input and advice in the creation of plans to integrate equity and inclusion framework activities and goals within the agency.
- Overseeing the development and implementation of data collection to measure workforce diversity and inclusion.

#### **b. Monitoring**

Monitor and evaluate agency progress toward equity and inclusion goals, objectives, and certification standards, and provide specific recommendations regarding methods through which the respective agencies may improve their efforts in providing equal opportunity to employees and applicants for employment. BEI will monitor the following areas:

- Outreach and recruitment efforts.
- Compliance with equity and inclusion policies, procedures, and programs.

- Disciplinary and termination actions for racial/ethnic minorities, veterans, and individuals with disabilities.
- Identification of foreseeable equity and inclusion concerns and suggestions for solutions.
- Equity and inclusion program accomplishments.

BEI will conduct onsite monitoring visits to review the EI Plan progress and program certification.

## **Phase V: Reporting**

Annually, agencies will submit a progress report to the Bureau of Equity and Inclusion (BEI). The report will document progress toward achieving equity and inclusion goals and will summarize the agency's efforts, accomplishments, and challenges (with a plan to address). Report information will be summarized by BEI and used to compile a statewide workforce equity and inclusion report that will be submitted to the Governor's Office.

**State of Wisconsin**  
**“Agency Name”**  
**Equity and Inclusion Plan**  
**January 1, 2021 to June 30, 2023**

## **Table of Contents**

<b>I.</b>	<b>Acknowledgments.....</b>
<b>II.</b>	<b>Commitment Letter.....</b>
<b>III.</b>	<b>Individuals Responsible for Directing/Implementing the Equity and Inclusion Plan.....</b>
<b>IV.</b>	<b>Introduction (Alignment with Vision, Mission, and Values).....</b>
<b>V.</b>	<b>Workforce Analysis Summary .....</b>
<b>VI.</b>	<b>Agency Goals, Strategies, Metrics to Advance Equity and Inclusion.....</b>
<b>VII.</b>	<b>Internal/External Communication of Equity and Inclusion Plan.....</b>
<b>VIII.</b>	<b>Agency Monitoring.....</b>
<b>IX.</b>	<b>Appendices.....</b>
<b>X.</b>	<b>References.....</b>

## **Acknowledgment**

We have reviewed and firmly endorsed the content of this equity and inclusion plan. We are committed to ensuring equal employment opportunity, freedom from discrimination, and affirmative action in compliance with state laws and policies as well as federal laws. By formally integrating equity and inclusion values and practices into existing processes, the Equity and Inclusion Plan enables progress and results to be measured agency-wide.

### **Appointing Authority:**

Full Name	Signature/Date:
-----------	-----------------

Title	Email
-------	-------

### **Equity and Inclusion Officer:**

Full Name	Signature/Date:
Phone Email	

### **Date of submission to DPM/BEI:**

**Each individual or group listed below contributed to the development of the plan.**

### **Implementation Team Members:**

### **Contributors and other subject matter experts consulted:**

### **Others as appropriate:**

{Agency}  
**Equity and Inclusion Commitment Letter**  
**{TEMPLATE}**

The [Agency's Name] hereby reaffirms our commitment to the principles of equity and inclusion for all employees and applicants without regard to an individual's race, color, sex, religion, national origin, age, disability, genetic information, or marital status.

The [Agency's Name] is firmly committed to meeting the state laws and policies, as well as federal laws, for equal employment opportunity and affirmative action. The [Agency's Name] recognizes that equal employment opportunity is a legal, organizational, and economic necessity in order to maximize the quality and diversity of the state's workforce. This commitment is extended to all job applicants and employees in every type of position, including unclassified, classified, project, limited-term, volunteers, interns, and work-study personnel.

*The [Agency's Name] has fewer than 30 permanent classified employees and is not required to submit a full affirmative action plan (language added for agencies with less than 30 FTE).* As part of the [Agency's Name] commitment to this overall process, we intend to apply equity and inclusion principles to all employment policies, procedures, and programs, wherever it's appropriate, to ensure equal employment opportunity and freedom from discrimination, including recruitment, selection, job assignment, training, compensation, benefits, discipline, promotion, transfer, layoff, and termination processes. Reasonable accommodation will be provided, as requested, to employees and applicants with disabilities.

The [Agency's Name] has developed and committed to maintaining a written Equity and Inclusion Plan. This Affirmative Action Plan has my total support, and the [Agency's Name] pledges its best good faith efforts to achieve the goals identified in the Equity and Inclusion Plan. I expect each manager, supervisor, and employee of the [Agency's Name] to aid in the implementation of this program and be accountable for complying with the objectives of this Equity and Inclusion Plan. The [Agency's Name] will maintain a monitoring and reporting system to ensure the overall compliance with the equity and inclusion mandates. The plan is available for review on the [Agency's Name] website or at the Human Resources office.

We look forward to working with the Division of Personnel Management, Bureau of Equity and Inclusion to implement our policies and programs in efforts to correct the present effects of past discrimination and to build a motivated and skilled workforce that is reflective of the population we serve.

Agency Head Name:

Agency Head Title

Date:

Signature: \_\_\_\_\_

Affirmative Action Officer Name:

Date:

Signature: \_\_\_\_\_

## **Individuals Responsible for Directing/Implementing the Equity and Inclusion Plan {TEMPLATE}**

### **Agency Appointing Authority**

The state agency appointing authority carries the overall responsibility for establishing an Equity and Inclusion Program, including goals, timetables, and compliance with all federal and state laws and regulations. The Appointing Authority:

- Communicates the direction and vision to agency leadership that ensures involvement and commitment to the agency's equity and inclusion efforts.
- Develops an equity and inclusion action plan to implement strategies that will comply with affirmative action, equity, and inclusion requirements, build infrastructure and culture committed to equity and inclusion, and incorporates equity and inclusion throughout the agency's work and public service.
- Engages a representative employee and stakeholder group in the planning and development process for the EI plan to review equity and inclusion related data, recommends opportunities for improvement, and provides support and shared ownership of agency strategies and desired outcomes.
- Ensures that designated personnel responsible for equity and inclusion efforts and programs are given the necessary authority, top management support, and resources to successfully implement their assigned responsibilities.
- Assesses and ensures internal workplace policies and procedures are equitable, culturally responsive, and promote inclusion.
- Provide professional development opportunities and resources that raise awareness, build knowledge and understanding, and encourage and promote an inclusive culture.
- Seeks advice and guidance from the Equity and Inclusion Advisory Committee on agency EI programs, initiatives, and policies.

### **Name of individual(s) responsible**

**Name:**

**Title:**

**Email:**

**Phone:**

### **Equity and Inclusion Officer**

The Equity and Inclusion Officer (EIO) or designee, as delegated by the EIO, is directly responsible for developing, coordinating, implementing the agency's EI plan. The Equity and Inclusion Officer:

- Plans, guides, and advises the appointing authority and executive leadership in establishing and maintaining equity and inclusion plans, programs, and policies. This includes engaging the appropriate individuals and stakeholders throughout the development and implementation and continuous improvement activities of plan actions.
- Coordinates, develops, and implements equity and inclusion initiatives that support the agency's equity and inclusion plan goals.
- Keeps the agency head and agency leadership at various organizational levels informed of EI developments, progress, and potential concerns.
- Ensures communication and dissemination of equity and inclusion plan, policy and program information, and employee access to the plan and related policies.
- Works with leadership to identify, coordinate, facilitate, or provide equity and inclusion training to increase awareness, support, and maintain compliance.

- Establishes and maintains internal monitoring, auditing, and reporting system to measure the effectiveness of the agency's programs and activities, ensure compliance, and meet state and federal requirements. This includes gathering, researching, and analyzing data.
- Audits hiring and promotion patterns and the selection of candidates for career development and training programs to remove barriers.
- Ensures agency selection criteria are objective, uniform and job-related, and that personnel decision-making processes adhere to EEO and AA principles.
- Promotes and coordinates agency participation in enterprise equity and inclusion programs and initiatives, including the State Student Diversity Internship program, the annual state Diversity Awards, the non-competitive appointment for certain disabled veteran's program, W-2 program, the disabled veteran's program, etc.
- Serves as the agency's point of contact for professional organizations and community groups to promote and assist with employment opportunities for underrepresented groups.
- Attends at least 12 hours of equity and inclusion and agency supervisory training annually.
- Participates in and advises the agency's Equity and Inclusion Committee as a non-voting member.

**Name of individual(s) responsible**

**Name:**

**Title:**

**Email:**

**Phone:**

**Equity and Inclusion Designee/Professional**

The designee/professional is responsible for assisting with the implementation of the equity and inclusion plan efforts within their agency. The EI designee/professional:

- Ensures dissemination of all relevant equity and inclusion information to appropriate staff.
- Reviews policies, procedures, and practices, and recommends changes to the EIO.
- Assists in development, implementation, and management oversight of policies, programs, and procedures for the administration of EI efforts for the agency.
- Assists with the promotion and coordination of agency equity and inclusion programs and initiatives, including the State Student Diversity Internship program, the annual state Diversity Awards, the non-competitive appointment for certain disabled veteran's program, W-2 program, the disabled veteran's program, etc.
- Ensures communication and dissemination of equity and inclusion plan, policy and program information, and employee access to the plan and related policies.
- Assist the EI Officer in conducting periodic audits of recruitment activity to measure the effectiveness of efforts and activities to attaining strategic equity and inclusion goals and objectives.
- Attends equity and inclusion and agency supervisory training annually.
- As designated, manages the agency's medical issues. This may include coordinating and monitoring the agency's FMLA and reasonable accommodation requirements to ensure compliance with the American with Disabilities Act (ADA).

**Name of individual(s) responsible**

**Name:**

**Title:**

**Email:**

**Phone:**

## **Executive HR Manager/HR Manager**

The Executive HR Manager/HR Manager is responsible for ensuring equitable and consistent administration and application of all personnel policies and provides direct supervision of the EI Officer and EI professionals. The Executive HR Manager/HR Manager:

- Maintains effective working relationships with agency EIO officers and designees.
- Provides leadership to HR staff and others to ensure personnel decision-making processes adhere to affirmative action, equal opportunity, and equity and inclusion and principles.
- Ensures the hiring managers and supervisors work effectively with the EIO to develop and execute the EI plan.
- Provides the EIO the support and data necessary to perform duties and responsibilities related to equity and inclusion.

### **Name of individual(s) responsible**

**Name:**

**Title:**

**Email:**

**Phone:**

**Equity and Inclusion Strategic Plan**  
**[Agency Name]**  
**Goals and Strategies**

Each agency should identify broad goals from its workforce analysis to address barriers in the advancement of equity and inclusion in each of the equity and inclusion focus areas (Recruitment, Retention, and Agency Culture). Once those goals are identified, the agency planning and development team will identify strategies to address the barriers. Each strategy chosen is included in the agency EI workplan.

Overarching Goals for EI	Strategies to Achieve Goals
<b>Recruitment Goal</b>  <b>The agency will actively address hiring disparities across all underutilized job classification.</b>	<ul style="list-style-type: none"> <li>• Assess policies and procedures for potential bias in selection and remove barriers to diversity, equity, and inclusion.</li> <li>• Promote equal opportunity in selection by reviewing current practices and processes through an equity and inclusion lens.</li> <li>• Forecast workforce needs, set strategic diversity hiring goals, and measure progress throughout the process.</li> <li>• Set standards for hiring authorities that incorporate an equity framework that clearly articulates racial equity, implicit and explicit bias, and individual, institutional, and structural disparity.</li> </ul>
<b>Retention Goal</b>  <b>The agency will actively address the disparity of promotions in marginalized populations and promote leadership opportunities to retain and reduce turnover or underutilized job classification.</b>	<ul style="list-style-type: none"> <li>• Establish career pathways with equitable access determined.</li> <li>• Create a shared leadership structure that promotes staff leadership and voices on issues that affect the workforce.</li> <li>• Provide development for supervisors and managers that focus on leadership, not management.</li> <li>• Create a mentorship program that matches employees with mentors at various levels of their desired career path.</li> </ul>
<b>Agency Culture</b>  <b>Promote an agency culture free of bias, a respectful culture that values diversity, promotes equity, and actively engages inclusion.</b>	<ul style="list-style-type: none"> <li>• Establish a strong business case for diversity and align our management and business practices accordingly.</li> <li>• Develop relationships with diverse communities as a matter of standard practice.</li> <li>• Empower our AEIAC to act as an advocate and a resource for equity and inclusion in the agency.</li> <li>• Establish a process for staff to access neutral conflict resolution support regarding issues that emerge around race, culture, ethnicity, gender, or other diversity-related issues; and act to support enhancement to agency respectful workplace policies.</li> <li>• Foster a culture of open communication and transparency, and promote forums for discussion of diversity, equity, and inclusion.</li> </ul>

## Appendix 3B

### Equity and Inclusion Strategic Plan - Workplan

The agency workplan represents the strategies and actions for the agency EI Plan. Each strategy identified to meet agency equity and inclusion goals is listed, and the actions to achieve that strategy are described. Each action implemented is part of the process to achieve specific strategic outcomes. The comprehensive selection of actions to support the strategy may be short-term or long-term actions. KPI's gauge the progress of the actions taken to reach the desired outcome. KPI's provide clarity to the process for reaching short-term and long-term goals and allows teams to focus on efforts that fall short and require attention immediately to stay on track. KPI's support the monitoring and continuous improvement activities of the strategic plan. Agencies should also list associated training identified to support the implementation for each focus area.

Recruitment Strategies	Actions	KPI	Outcome/Metric	Responsible staff/office	Targeted Completion Date
Assess policies and procedures for potential bias in selection and remove barriers to diversity, equity, and inclusion.	Establish a committee assigned to review practices and policies in the selection process using a bias equity tool.	Committee will review and implement changes as necessary to 30-35 % of all selection policies and practices annually.	100% of the agencies selection process and policies will be reviewed	John Smith, PPA Kate Johnson, EIO Mike Smith, Staff Committee member Kate Longfeather, HR	April 2023

Associated Recruitment Staff Training	<ul style="list-style-type: none"> <li>• Train all supervisors and managers on the use of an equity tool in the development of policy and procedure.</li> </ul>
---------------------------------------	---

Retention Strategies	Actions	KPI	Outcome/Metric	Responsible staff/office	Targeted Completion Date

Associated Retention Staff Training	<ul style="list-style-type: none"> <li>• </li> </ul>
-------------------------------------	--

EI Culture Strategies	Actions	KPI	Outcome/Metric	Responsible staff/office	Targeted Completion Date

Associated Culture Staff Training	<ul style="list-style-type: none"> <li>• </li> </ul>
-----------------------------------	--

**Communication and Dissemination of Equity and Inclusion Plan  
{TEMPLATE}****Internal Methods of Communication**

- A memorandum detailing the location of the Equity and Inclusion Plan and the responsibility to read, understand, support, and implement equal opportunity and affirmative action will be sent from the agency's leadership or alternatively, the Equity and Inclusion Officer, to all staff on an annual basis.
- The agency's Equity and Inclusion Plan is available to all employees on the agency's internal website at [insert address here] or in a print copy to anyone who requests it. As requested, the agency will make the plan available in alternative formats.
- A physical copy of the Agency's Affirmative Action Plan will be available to employees at the following address: [insert address here].
- Nondiscrimination and equal opportunity statements and posters are prominently displayed and available in areas frequented and accessible to employees.

**External Methods of Communication**

- The agency's Equity and Inclusion Plan is available on the agency's public website at [insert address here] or in a print copy to anyone who requests it. As requested, the agency will make the plan available in alternative formats.
- The agency's website homepage, letterhead, publications, and all job postings, will include the statement "an equal opportunity employer" and "women, minorities, and individuals with disabilities are encouraged to apply." The agency will also ensure a representative ratio of diversity is on all diversity marketing materials.
- Nondiscrimination and equal opportunity statements and posters are prominently displayed and available in areas frequented by and accessible to members of the public. Examples of posters displayed include: Equal Employment Opportunity is the Law, Employee Rights Under the Fair Labor Standards Act, and the Americans with Disabilities Act Notice to the Public.
- A physical copy of the Equity and Inclusion Plan will be available to contractors, vendors, and members of the public at the following address: [insert address here].