

State of Wisconsin  
Department of Revenue



Equity and Inclusion Action Plan

January 1, 2024 –  
December 31, 2026

## Table of Contents

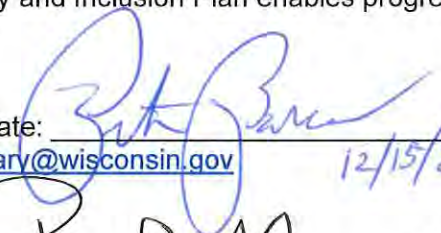
I.	Acknowledgments.....	1
II.	Agency Statement of Commitment.....	3
III.	Individuals Responsible for Directing and Implementing the Equity and Inclusion Plan.....	4
IV.	Introduction (Alignment with Vision, Mission, and Values).....	8
V.	Workforce Analysis Summary .....	11
VI.	Agency Goals, Strategies, Metrics to Advance Equity and Inclusion.....	13
VII.	Internal and External Communication of Equity and Inclusion Plan.....	25
VIII.	Agency Monitoring.....	26
<b>Appendices</b>		
	Appendix A – DOR Mission Vision Values.....	27
	Appendix B – DOR Demographics.....	30
	Appendix C – Soar Racial Justice Delivery Team.....	32
	Thoughts/Acknowledgements by Task Force members .....	34

## I. Acknowledgments

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:

Peter Barca  
Secretary

Signature/Date:   
DORSecretary@wisconsin.gov

12/15/23

### Equity and Inclusion Officer:

Racheal Harris

Signature/Date:   
racheal.harris@wisconsin.gov

12/18/23

Date of submission to DPM/BEI: September 8, 2023

Each individual or group listed below contributed to the development of the plan.  
Implementation Team Members:

Buchholz, Nicole M.  
Revenue Agent 3

Dokey, Curtiss J.  
Revenue Auditor 1

Stengel, Jonathan T.  
Revenue Auditor 2

Tirado-Veguilla, Francisco J.  
Revenue Auditor 4

Czerepinski, Heather A.  
Revenue Agent 2

Alpizar, Cynthia M.  
Revenue Agent

Williams, Roxanne R.  
Revenue Agent

Essers, Leslie A.  
Revenue Management Supervisor

Steel, Stephanie M.  
Revenue Auditor 3

Conklin, Rosalind D.  
Executive Staff Assistant

Niquette, Lori K.  
Revenue Agent Supervisor

McNeilly, James W. Jr.  
Attorney

Mercer, Amy J.  
Property Assessment Specialist - Journey

Ashby, Stacie L.  
Program and Policy Analyst - Adv

Bolden, Danielle S.  
Revenue Administrative Manager

Redington, Cari R.  
R&P Division Administrator

Bah, Momodou.  
Revenue Economist Conf Senior

Ryddner, Melody  
Property Assessment Supervisor

Hudson, Tameesha T.  
Revenue Auditor 5

Platts, Tobie J.  
IS Business Analyst Senior

Cacciotti, Jerry D. (Charlie)  
Revenue Agent

Cruse, Tina N.  
Revenue Auditor 3

Chavis, Britni T.  
Revenue Auditor 2

Niva, Ginger P.  
Revenue Agent 2

Murray, LoToya  
Revenue Agent 3

Kiedrowski, Leo J.  
Revenue Auditor 2

Gonzalez, Luz S.  
Revenue Auditor 4

Lisowski, David  
Lottery Services Specialist Advanced

Wynn, Christine M.  
Revenue Auditor 3

Kupper, David J.  
Revenue Auditor 6

Xiong, Koua  
Revenue Auditor 2

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

Harris, Racheal A.  
Human Resources Program Officer

Weber, Linda S.  
Human Resources Specialist-Sen

**Special Thanks to the three Subcommittee  
Chairs:**

Tobie Platts – Recruitment  
Stacie Ashby – Retention  
Danielle Bolden - Culture

## II. Department of Revenue Equity and Inclusion Commitment Letter

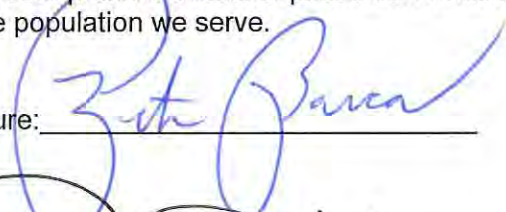
The **Department of Revenue** hereby reaffirms our commitment to the principles of equity and inclusion for all employees and applicants without regard to an individual's race, color, sex, religion, national origin, age, disability, genetic information, or marital status.

The **Department of Revenue** is firmly committed to meeting the state laws and policies and federal laws for equal employment opportunity and affirmative action. The **Department of Revenue** recognizes that equal employment opportunity is a legal, organizational, and economic necessity to ensure equity and diversity of the state's workforce. This commitment extends to all job applicants and employees in every type of position, including unclassified, classified, project, limited-term, volunteers, interns, and work-study personnel.


The **Department of Revenue** has developed and committed to maintaining a written Equity and Inclusion Plan. This Affirmative Action Plan, as well as the prior (2021-2023) Equity and Inclusion Action Plan, have my total support, and the **Department of Revenue** 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 **Department of Revenue** to aid in the implementation of this program and be accountable for complying with the objectives of this Equity and Inclusion Plan. The **Department of Revenue** will maintain a monitoring and reporting system to ensure compliance with the equity and inclusion mandates. The plan is available for review on the **Department of Revenue** 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 to correct the present effects of past discrimination and build a motivated and skilled workforce that reflects the population we serve.

Agency Head Name: Peter Barca  
Agency Head Title Secretary  
Date: December 15, 2023

Signature: 

DPM Equity and Inclusion Officer Name: Racheal Harris  
HR Program Officer  
Date: December 15, 2023

Signature: 

### III. Individuals Responsible for Directing/Implementing the Equity and Inclusion Plan

#### Agency Appointing Authority

The state agency appointing authority is responsible 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 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.
- 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:** Peter Barca

**Title:** Secretary

**Email:** DORSecretary@wisconsin.gov

**Phone:** (608) 266-6466

#### Equity and Inclusion Officer

As delegated, the Equity and Inclusion Officer (EIO) or designee 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 responsibility includes engaging the appropriate individuals and stakeholders throughout the development and implementation and continuous improvement activities of plan actions.
- Develops, coordinates, and implements equity and inclusion initiatives that support the agency's equity and inclusion plan goals.
- Keeps the agency head and 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 review includes gathering, researching, and analyzing data.
- Audit the 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 noncompetitive appointment for certain disabled veterans' program, the 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 training annually.
- Attends equity and inclusion and agency supervisory training.
- Participates in and advises the agency's Equity and Inclusion Committee as a non-voting member.

**Name of individual(s) responsible**

**Name:** Jennifer Ginter-Lyght

**Title:** Equity & Inclusion Specialist

**Email:** jennifer.ginterlyght1@dva.wisconsin.gov

**Phone:** TBD

**Equity and Inclusion Professional**

The designee/professional is responsible for assisting with implementing 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 developing, implementing, and managing oversight of policies, programs, and procedures for the administration of EI efforts for the agency.
- Assists with promoting and coordinating agency equity and inclusion programs and initiatives, including the State Student Diversity Internship program, the annual state Diversity Awards, the noncompetitive appointment for certain disabled veterans' program, the 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 attain strategic equity and inclusion goals and objectives.
- Attends at least 6 hours of equity and inclusion training annually.
- Attends equity and inclusion and agency supervisory training.
- As designated, manages the agency's medical issues. This responsibility may include coordinating and monitoring the agency's FMLA and reasonable accommodation requirements to ensure compliance with the Americans with Disabilities Act (ADA).

**Name of individual(s) responsible**

**Name:** Racheal Harris

**Title:** HR Program Officer

**Email:** Racheal.Harris@wisconsin.gov

**Phone:** (262) 878-6792

## **Executive HR Director and HR Manager**

The Executive HR Director and HR Manager are responsible for ensuring equitable and consistent administration, applying all personnel policies, and providing resources, support, and supervision of the EI Officer and professionals. The Executive HR Director and 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 with the support and data necessary to perform duties and responsibilities related to equity and inclusion.

### **Name of Executive HR Director**

**Name:** Wendy Copus

**Title:** HR Director

**Email:** Wendy.Copus@wisconsin.gov

**Phone:** (608) 267-1796

### **Name of HR Manager**

**Name:** Wendy Copus

**Title:** HR Director

**Email:** Wendy.Copus@wisconsin.gov

**Phone:** (608) 267-1796

## **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, gather additional data as needed, recommends opportunities for improvement, and provides support and shared ownership of agency strategies and desired outcomes.
- Assists with developing, writing, rolling out, and monitoring the agency's EI Strategic Plan.
- Establishes a plan for regular communication regarding the EI plan process, activities, and outcomes to build transparency, broad participation, and support.



**List names of individuals role and responsibilities on the team:**

Maria Guerra Lapacek – Equity and Inclusion Task Force Committee Coordinator

**Culture Subcommittee:**

Daniel Bolden, Chair  
Cynthia Alpizar  
Britni Chavis  
Rosiland Conklin  
Heather Czerepinski  
Racheal Harris  
James McNeilly  
Ginger Niva  
Cari Redington  
Roxanne Williams  
Koua Xiong

**Recruitment Subcommittee:**

Tobie Platts, Chair  
Jerry Cacciotti  
Curtiss Dokey  
Racheal Harris  
Tameesha Hudson  
Leo Kiedrowski  
David Lisowski  
Amy Mercer  
LoToya Murray  
Melody Ryddner  
Francisco Tirado-Veguilla  
Linda Weber

**Retention Subcommittee:**

Stacie Ashby, Chair  
Momodou Bah  
Nicole Buchholz  
Tina Cruse  
Leslie Essers  
Luz Gonzalez  
Racheal Harris  
David Kupper  
Lori Niquette  
Jonathan Stengel  
Stephanie Steel  
Christine Wynn

#### **IV. Introduction (Alignment with Vision, Mission, and Values)**

The Department of Revenue (DOR) serves as the revenue-generating arm for the state of Wisconsin and is responsible for various important functions to that end, including the Wisconsin Lottery. The DOR is organized into 7 divisions, and operates out of our main office in Madison, and 6 district offices within the state of Wisconsin (Milwaukee, Appleton, Green Bay, Eau Claire, Wausau, Onalaska), and two district offices located out of state- one in Glen Ellyn, IL and the other in Edina, Minnesota.

Under the leadership of Secretary Barca, the department has been working to stress the importance of diversity, equity, and inclusion. The Secretary's office took an active role in putting together this equity and inclusion action plan. The department of revenue serves all of the people of the state of Wisconsin, and the department seeks to rise to meet the needs of all its customers. In addition to creating a culture that will allow employees to bring their whole selves to work, the department also strives to serve the customer where they are. We are striving to carry out our mission with empathy and maintaining the dignity of the public we serve. In order to carry out our mission, we have put together this action plan to build a culture of inclusivity and align our recruitment, and retention efforts with our values of equity and inclusivity.

The largest Division within DOR is the Income, Sales, and Excise Division (IS&E), which administers the state's tax laws, including individual and corporate income taxes, sales taxes, and excise taxes. In addition to administering the tax laws, the IS&E Division is also responsible for collecting outstanding debt for other local governments through our State Debt Collection program, and also for returning property that is unclaimed or abandoned after a period of time through our Unclaimed Property program.

The DOR also houses the State and Local Finance Division (SLF), which assists local governments with property assessments and financial management. Our SLF division also assesses manufacturing property and administers the programs that provide state financial aid to local governments, such as the Shared Revenue program.

Our Lottery Division (LOT) administers the Wisconsin state lottery, and coordinates Wisconsin's membership in multi-jurisdictional lotteries such as Powerball and Mega millions. The proceeds generated by the Wisconsin Lottery are directed towards providing property tax relief for homeowners.

Our Division of Research and Policy (R&P) helps formulate state tax policy, and regularly estimates state revenues and forecasts state economic activity.

The remaining 3 divisions are divisions that primarily serve other divisions within the DOR and have limited contact with external customers. The Division of Technology Services (DTS) equips the DOR with the most efficient and cost-effective technology to facilitate the work of the DOR. The Office of the General Counsel (OGC) assists in the adjudication and resolution of tax laws, while the Enterprise Services Division (ESD) provides support in the areas of budget administration, facilities, procurement and works with our assigned regional Human Resources staff.

The kick-off meeting for this Equity and Inclusion Action Plan was held on April 6, 2023. The larger group generally met monthly throughout the Spring. The agenda included a review of the Department demographics, along with a review of the quarterly dashboards that DPM shares with the regions. Because the Action Plan team included two key members of our DPM team as advisors, we were able to have detailed conversations about the recruitment process, and the impact of outreach events on our recruitment efforts. We also discussed how the lengthy recruitment process can negatively impact our recruitment efforts. The participation by our DPM partners was extremely valuable, as they served as subject matter experts on human resource matters, which facilitated the answering of questions that the team members had.

The group then reviewed the existing 2021-2023 Equity and Inclusion Action Plan, with a focus on identifying the items that had been completed and the items that required additional work.

After the agenda items were reviewed with the entire Equity and Inclusion Action Plan team, including department demographics, demographic dashboards, recruitment process and completed Action Plan items, the team separated out into the Committees to start identifying the workplan items.

In approximately June of 2023, each committee, the Recruitment Committee, Retention Committee and Culture Committee began meeting regularly as a Committee to brainstorm the ideas for the workplans. Each of the Committee leaders planned those meetings and worked with their respective teams to document their progress.

The larger Equity and Inclusion Action Plan team continued to meet monthly as a check-in meeting to check on the progress of each of the Committees. Our DPM partners, Racheal Harris and Linda Weber continued to participate in the conversations and answer questions that the team members had regarding the recruitment process and other human resource functions.

In the Fall of 2023, each of the Committees finalized their portion of the Work Plans and submitted them to the larger Equity and inclusion Action Plan team for review and to input into the draft document for finalization of the working draft.

The working draft was submitted to DPM's BEI on September 8, 2023, for the first review.

This Equity and Inclusion Action Plan aligns perfectly with the Department of Revenue's Mission, Vision, and Values (MVV). In fact, this Action Plan will build upon the successes of our prior Equity and Inclusion Action Plan completed for January 1, 2021 – December 31, 2023.

### **Mission, Vision, Values**

In the Fall of 2021, the Department embarked on the Strategic Planning 2.0 project, which was designed to arrive at the Department's Mission, Vision, and Values. The project was designed to brainstorm over two separate dates and narrow down the ideas to arrive at the Department's MVV. The first day was comprised of a diverse set of DOR employees from various divisions and levels. The second day was comprised of DOR senior leaders. Remarkably, the two groups arrived at extremely similar MVVs, which made our edit process extremely easy. It was heartening to see that the two groups were in sync.

Ultimately, we adopted the following as our Mission, Vision, and Values:

***Mission***

Strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, our customers, and communities.

***Vision***

Our vision is to be the premier agency in providing innovative, accessible resources, and exceptional service built on a foundation of trust, inclusivity, and creativity. We are guided by our core values: integrity, knowledge, innovation, empathy, inclusivity, and security.

***Values***

Integrity, Security, Innovation, Knowledge, Inclusion, and Empathy

In addition to communicating to the entire department, department leadership stresses the importance of embracing the departments MVVs. We have placed posters throughout the department and in district offices and continue to reinforce the message in weekly communications to staff. See Appendix A.

## V. Workforce Analysis Summary

According to the most recent data available from DPM, which tracks the department employment as of the end of Fiscal Year 2023, there were 1012 employees in the Department of Revenue.

	<b>Total DOR workforce<sup>1</sup></b>	<b>State Service Workforce<sup>2</sup></b>	<b>State of WI Population<sup>3</sup></b>	<b>DOR Workforce as of February 2020<sup>4</sup></b>
White	79.48%	81.9%	80.1%	80.55%
Black/African American	6.3%	7.3%	6.6%	7.15%
Hispanic/Latino	4.41%	4%	7.6%	3.62%
Am Indian/Alaska Native	1%	0.5%	1.2%	.67%
Asian	6.12%	3%	3.2%	5.72%
Native Hwn/Oth Pac Island	0.09%	0.1%	.1%	Not listed
Mixed/Not Specified	2.7%	3.3%	1.2%	2.31%
Male	47.34%	47.7%	50.2%	49.48%
Female	52.66%	52.3%	49.8%	50.52%
Veterans	5%	7.5%	5.3%	5.91%
Disabled	9.45%	8.8%	8.1%	11.92%

The demographic information from our entire workforce tracks closely to the demographic information for the state of Wisconsin. Our demographic information is largely unchanged from our last review in 2020. Demographic information for the state of Wisconsin, and the state workforce is provided merely as an indication of the applicant pool, or benchmarking purposes.

The majority of DOR's workforce is located out of the main office in Madison. The second largest office is located in Milwaukee. The larger urban centers are generally more diverse, and offer a larger pool of diverse candidates, however, the department seeks to also diversify our district offices.

There was a focus in the recruitment committee conversation about the drop in accounting majors, and the impact that is happening in the industry. This led to specific focus for recruitment of auditors of diverse backgrounds.

The committee also discussed other potential barriers to the recruitment of diverse candidates, which included a review of our recruitment practices to ensure that any barriers to recruitment be removed.

<sup>1</sup> Employee data provided by DOA-DPM on 10/20/23

<sup>2</sup> Employee data provided by DOA-DPM on 10/20/23

<sup>3</sup> U.S. Census from July 1, 2022 <https://www.census.gov/quickfacts/fact/table/WI/PST045222>

<sup>4</sup> 2019-2021 Equity and Inclusion Action Plan

Our goal is to build a culture that is inclusive and attracts a diverse workforce. We also aim to build a deep bench of emerging leaders that will be ready to take-on supervisory roles when they become available. Our emerging leaders' program, which was an action item in our last plan is helping us with our succession planning for DOR of the future.

## VI. Agency Goals, Strategies, Metrics to Advance Equity and Inclusion

### Success of Prior Plan

It is important to note that this Action Plan builds upon the strong foundation built by the 2021-2023 Action Plan. There are a number of items in each category that are worth noting that have been accomplished.

### ***Recruitment***

There are a number of efforts that are worth highlighting from our recruitment efforts.

The first is that the State has added a Diversity, Equity, and Inclusion statement to all recruitments. All recruitment contains the following language designed to specifically welcome diverse candidates to apply.

***The Department of Revenue is an Equal Opportunity and Affirmative Action employer seeking a diverse and talented workforce.***

Recruitment materials have been reviewed by the Department of Revenue's Diversity Advisory Council (DAC), and the DAC has made recommendations to better align with our goal of creating a more diverse workforce. The DOR has since made changes to ensure we are highlighting our diverse workforce. The idea is to ensure that all job seekers feel welcome in our department.

Two efforts that were also born out of our desire to minimize the vacancy rate in our department, are the VIP Recruitment Team, and our recruitment video for auditors. Both of these efforts were initially targeted at auditors, but their mission has expanded beyond the need to hire just auditors and are being employed to recruit for the larger agency.

Our VIP (Virtual and In-Person) recruitment team identifies job/career fairs where the DOR can attend and also identifies staff to attend and represent the Department to generate interest in working for the department of revenue. Past events include job fairs for universities, such as Marquette University, UW-Eau Claire, UW-Whitewater, the Foundation for Black Women's Wellness, and the Dane County Virtual Career Fair. The advantage is that the VIP Recruitment Team will both appear in-person when possible, or virtually, so there are more ways to engage with potential job seekers. Special thanks to Jen Dambach and Anna Tennesen for their leadership in getting the VIP recruitment team started.

The audit recruitment video, which can be viewed here: [DOR Video Center \(wi.gov\)](#)

The Department continues to participate in the Enterprise-wide Diversity Internship Program, where we bring in college students to work on projects over the summer.

Our largest Division, the Income, Sales, and Excise (ISE) Division had largely not participated in internship programs, in part because of the complexity of our IT systems, and the amount of

training required for functioning. However, the ISE Division created an Auditor Internship program by providing tasks that do not require intensive training in order to accomplish.

The internship program is in addition to the Audit Gateway program, where the department pays for the last two years of university needed to become an Auditor. Selected applicants will work for DOR while attending school to complete their accounting degree. The department has recently expanded this program to internal candidates as well as external candidates to the department.

Some of the items left to accomplish include further engagement with high school students to introduce them to the idea of a career with the DOR, conduct a review of whether there are any physical barriers that might impede work for people with disabilities, continue to actively recruit people with disabilities, and continued work on removing unconscious bias from interviews/hiring.

### ***Retention***

There are several accomplishments worth highlighting from our Retention portion of the Action Plan.

First, our performance evaluations were updated by the Department of Administration (DOA) Division of Personnel Management (DPM) to include Diversity, Equity, and Inclusion principles in the annual performance evaluations, thereby elevating the importance.

Additionally, our DPM partners created a "lunch-n-learn" series to assist our staff members in understanding Human Resource concepts which might be unique to state service. These "lunch-n-learn" programs include sessions on filing a discrimination or respectful workplace complaint, understanding the reclassification process, advantages of sabbatical, interviewing and resume-writing.

The Department created an "Emerging Leaders" program to provide leadership training to staff who are currently not in supervisory or leadership roles, but aspire to be, and/or work in areas where leadership roles may be opening in the near future. In selecting candidates for the Emerging Leader cohorts, attention is given to ensure we have a diverse pool, which includes candidates from district offices as well as from our different divisions.

The Secretary provides office hours every quarter which are open to all staff in the department whether in person or virtual. The Secretary also encourages other senior leaders to open up office hours for their staff as a means of creating more dialogue and relationship-building with staff, even if they don't directly supervise those staff.

The department required all Supervisors, managers, and senior leaders to take a 6-hour Diversity, Equity and Inclusion training course provided by DOA-DPM.



There are on-going efforts to assist in our retention efforts. For example, we continue to use data to inform new policies. We are increasingly able to access DPM data regarding turnover, or from exit interviews in order to assist us in identifying, and subsequently addressing any issues that might be causing unnecessary turnover. The department will also continue to encourage cross-unit advancement.

## **Culture**

There were many great ideas that surfaced during the conversations about improving DOR culture, several of which are highlighted below.

As mentioned above, the DOR updated its mission statement, and adopted "inclusivity" as one of its core values. The mission statement now reads:

*Strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, our customers, and communities.*

The DOR leadership has emphasized the need to call people by the name they would like to be called and to be referred to by their preferred pronouns. The DOR DAC arranged a lunch-n-learn session in March of 2021 on preferred pronouns hosted by the Milwaukee LGBT Community Center.

The Secretary sponsored the SOAR Mentoring committee to build a successful mentoring program, which continues to provide yet another way that DOR staff can build relationships and get feedback from more senior members of our team.

Another successful program has been the creation by DOR staff of the Employee Resource Groups (ERG). The DOR now has 6 ERGs. In 2021, we saw the start of the Black/African American, and LGBTQ ERGs, and subsequently a Latino/Hispanic ERG. Then, there was an Asian-American Pacific Islander (AAPI) ERG, followed-up with a Native American ERG, and now we have a Veterans ERG as well. The department is fortunate to have these ERGs who organize lunch-n-learns as well as cultural enrichment for the entire staff.

While DOR did not administer a specific survey regarding diversity, equity and inclusion, the DOR added demographic questions to its existing Employee Engagement survey. The addition of this demographic information allows the department to review the survey results of the employee engagement survey by cross tabs related to the specific demographic attributes.

One last item that is important to note is that during the summer of 2020, our Country was not only experiencing the difficulty of surviving a global pandemic, but we were also shaken by the murder of George Floyd, which was captured on a cell phone camera. At the time, many DOR staff members expressed the need to contribute in some way to bringing about racial harmony. The department's strategic planning group created a "SOAR Racial Justice" team, which released its own recommendations. The 2021 Equity and Inclusion Task Force was meeting concurrently with the SOAR Racial Justice team. See Appendix for the recommendations and completion information. It is important to note that there are many similarities in the recommendations. One highlight of the SOAR Racial Justice team recommendations has

been the Small Business Outreach Team, which was created to target chambers of commerce throughout the state that cater to small, minority-and women-owned businesses. The idea is to ensure they understand tax compliance so that they avoid collections actions, and/or high interest and fines. The crux of the idea was to ensure the long-term viability of their businesses.

In 2021, the DAC promoted a United Way of Wisconsin campaign entitled "21 week Equity Challenge" which sought to raise awareness of issues of diversity, equity, and inclusion. The DAC hosted lunch-n-learn conversations to share the experience and reactions to that week's particular challenge.

There were a few items that the department continues to work on. First, our work to make district offices more welcoming continues. We have experienced space issues in certain district offices, and there is currently a space study being done to better understand our space needs in each district office going forward.

**Equity and Inclusion Strategic Plan  
Department of Revenue  
Goals and Strategies**

DOR is committed to creating an inclusive environment such that all employees will feel welcome to apply their skills and talents to the best of their abilities without concern for workplace harassment or discrimination of any kind. DOR is seeking to analyze and address barriers in the advancement of equity and inclusion in each of the equity and inclusion focus areas (Recruitment, Retention, and Agency Culture). Strategies for achieving our Equity and Inclusion goals are listed in our Workplan in the next section.

<b>Overarching Goals for DEI</b>	<b>Strategies to Achieve Goals</b>
<p><b>Recruitment Goal</b></p> <p>DOR will actively work towards diversifying our workforce through recruitment</p>	<ul style="list-style-type: none"> <li>• Increase candidate pool to include higher percentage of diverse applicants</li> <li>• Increase transparency in the hiring and promotion process</li> <li>• Review current recruitment policies and make improvements to make recruitment more inclusive</li> <li>• Review recruitment materials to ensure the message of inclusion is evident</li> <li>• Increase opportunities for students from diverse populations</li> <li>• Increase opportunities for students from diverse populations to become auditors</li> <li>• Elevate the importance of DEI in the hiring process</li> <li>• Continue to increase hiring of employees with disabilities and foster an inclusive environment for individuals with disabilities</li> <li>• Increase employment opportunities in areas outside of headquarters</li> <li>• Associated recruitment staff training to remove bias from the interviewing process</li> </ul>
<p><b>Retention Goal</b></p> <p>DOR will promote leadership and training opportunities in order to promote more people of color into leadership positions and assist with agency retention.</p>	<ul style="list-style-type: none"> <li>• Review and identify policies that contradict the goals of DEI</li> <li>• Encourage recognition and rewards</li> <li>• Provide opportunities for staff to speak freely to managers</li> <li>• Train and promote internal candidates</li> <li>• Identify and require DEI training for managers and supervisors</li> <li>• Identify compensation policies that impact DEI and mitigate impacts where possible</li> </ul>
<p><b>Culture Goal</b></p> <p>DOR will promote a respectful, inclusive agency culture. "Inclusion" is one of DOR's core values, and as an agency, we seek to ensure everyone feels welcome.</p>	<ul style="list-style-type: none"> <li>• Welcome Committee and onboarding for all new employees in each district office</li> <li>• Mental Health awareness and Wellbeing training</li> <li>• Visibility and accessibility to senior leadership and directors</li> <li>• Build a DOR Community</li> <li>• Enhance employee recognition program</li> </ul>

## Equity and Inclusion Strategic Plan – Workplan

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
Increase candidate pool to include higher percentage of diverse applicants	<p>1) Continue to review existing advertising efforts and expand outreach to platforms DOR has not used before (specifically diverse professional organizations, churches, and non-profit organizations, community spaces, job centers, commercials, and others).</p> <p>2) Review position qualifications to ensure requirements listed are necessary for successful performance of in position.</p> <p>3) Rewrite job postings to be succinct and relevant to reduce wordiness. Link to additional information and resources, when appropriate.</p> <p>4) Create standard operating procedure to create QR codes linked to open positions for use at career fair events and non traditional advertising routes to post in public spaces.</p>	Percentage of candidates selecting new platform (how they learned about the position) – will DPM have this data? Or ask during interview process?	<p>At least 10% of new applicants learn about DOR employment opportunities through new advertisement efforts.</p> <p>Quarterly report detailing different advertisement strategies used and where these advertisements are taking place.</p>	HR Recruiters/Equity and Inclusion Specialist /DAC/ Bureau Supervisors and/or Managers	Check on progress quarterly.
Increase Transparency in the hiring and promotion process	<p>1) Promote and host virtual/physical open house presentations by DOR Divisions open to internal and external audience that allows for Q&amp;A about opportunities/advancement.</p> <p>2) Continue offering and promoting HR Hot Topics and other training for DOR employees on requirements, processes and opportunities related to the hiring process.</p>	Host an open house to discuss job opportunities and promotions	Increase the knowledge of potential applicants of the many job opportunities at DOR, in addition to the, minimal job requirements, hiring process, and promotional opportunities.	Equity and Inclusion Specialist /HR Recruiters /Division Administrators/Supervisors and/or Managers	Check on progress quarterly.

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
Review current recruitment policies and make improvements to make recruitment more inclusive	<ol style="list-style-type: none"> <li>1) Explore opportunities to remove names and identifying information from application material, or develop standardized procedures to remove, to create a 'blind review' experience for rating panel members.</li> <li>2) Create standardized guidelines for rating panel members to contact HR if significant discrepancies in rating scores exist between rating panel members.</li> <li>3) Evaluate timesaving efforts and reduce cycle time from recruitment to offer.</li> <li>4) Evaluate timesaving efforts to reduce and streamline process for onboarding.</li> <li>5) Explore non-monetary incentives for employee referrals</li> </ol>	<p>Standardized language (template) sent from HR to all panel members.</p> <p>Track cycle time from recruitment to offer and analyze results for improvement.</p> <p>Track cycle time for onboarding process and analyze results for improvement.</p>	<p>Review the number and demographics of applicants for DOR positions.</p> <p>Identify options for 'blind' application reviewing.</p> <p>Review non-monetary incentive programs of other companies and explore implementation for DOR</p>	HR Recruitment / Equity and Inclusion Specialist	<p>Target of June 2024 for identifying options.</p> <p>Target date June 2024 for standardized language for HR personnel to use.</p> <p>Quarterly progress updates for reduction to cycle time regarding hiring process</p>
Review current recruitment materials to ensure the message of inclusion is evident	<ol style="list-style-type: none"> <li>1) Update DOR's careers page to have a statement/commitment to diversity, and testimonials from employees related to diversity and work life balance.</li> <li>2) Quick links to the career page in the top right corner of the home page of <a href="http://revenuewi.gov">revenuewi.gov</a></li> </ol>	Updated DOR careers page	Review the number and demographics of applicants for DOR positions.	Equity and Inclusion Specialist/DAC/HR	Target of June 2024 for proposed careers page updates.
Increase opportunities for students from diverse populations	<ol style="list-style-type: none"> <li>1) Provide internship opportunities for high school and/or college students participating in the State's Diversity Internship program.</li> <li>2) Promote the internship program across the agency and explore adding additional positions to program.</li> <li>3) Engage with high schools in areas with high diversity and with accounting programs to make HS students aware of opportunities at DOR.</li> <li>4) Use LTE positions to create pathways into permanent jobs for diverse high school students and/or diverse college students.</li> <li>5) Encourage more high schools to adopt a VITA program</li> </ol>	Track the number of youth (high school/college) we are employing at DOR	Have at least 5 DOR internship opportunities with a focus on diversity available and promoted at a college fair in both Milwaukee and Madison.	DOR Equity and Inclusion Specialist/HR/Divisions	Check on progress quarterly. Target internships for the summer.
Increase opportunities for students from diverse populations to become auditors.	Continue promoting IS&E's Audit/Gateway program with MATC and UW Milwaukee.	Student enrolled in program.	Recruit at least 5 student/employees via the Audit/Gateway program every year.	IS&E/HR/Equity and Inclusion Specialist	Check on progress quarterly

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
Elevate the importance of DEI in the hiring process	1) Continue including questions related to DEI for applicants, particularly those applying for supervisory roles. 2) Encourage one panel member from underrepresented group, in addition to a male and female. 3) Continue training more racial minorities to be interviewers and create standardized pool for hiring managers to select panel members from (volunteers must self-identify diversity status).	Review & update interview questions. Train more Diverse employees to assist in interview Process	100% participation across districts.	HR/Equity and Inclusion Specialist /Divisions	Check on progress quarterly
Continue to Increase hiring of employees with disability	Nurture current and develop new partnerships with local and state government agencies and community organization serving individuals with disabilities.	Track the number of newly created partnerships.	Increase percentage of candidates who identify as disabled.	HR/Equity and Inclusion Specialist/ESD/Divisions	Check on progress quarterly
Promote TeamWorks and DVR LTE programs among hiring managers	Partner and develop plan with DVR to hire LTEs during the tax processing season.	Continue outreach to TeamWorks	Continue to hire LTEs from the Vocational Rehabilitation program from DWD	HR/Equity and Inclusion Specialist/ESD/IS&E	Check on progress quarterly
Foster an inclusive environment for individuals with disabilities	1) Continue to identify whether there are any physical barriers that might impede work for people with disabilities, even in district offices. 2) Work with DHR and ESD to remove any/all physical barriers.	No physical barriers exist	Ensure DOR is addressing any physical barriers	HR/Equity and Inclusion Specialist/Divisions /DAC	Check on progress quarterly
Increase employment opportunities in areas outside of headquarters	1) Identify positions, both entry and advanced, that can be performed fully remote. 2) Create higher-level opportunities in non-Madison offices.	Track the number of positions reviewed and identified as eligible for full remote work.  Move supervisor positions to district offices.	Create list of fully remote eligible positions.  Increase diversity of DOR Supervisors.	Secretary Office/Divisions/H R	Check on progress quarterly
Associated recruitment staff training to remove bias from the interviewing process	1) Continue to require rating and interview panel participants to take unconscious bias training. 2) Continue promoting and training all supervisors and managers on the use of an equity tool in the development of policy and procedure. Ex: <a href="http://www.racialequityalliance.org">www.racialequityalliance.org</a>	Ensure all interviews are conducted by a panel trained in unconscious bias.	100% participation annually	Secretary Office/Divisions/H R	Check on progress quarterly

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
Review and identify policies that contradict the goal of Diversity, Equity, and Inclusion (DEI)	The policy committee of the Diversity Advisory Council will review policies and make recommendations related to diversity, equity, and inclusion	Equity and Inclusion Specialist will lead the effort	2 policies reviewed each year Report will be posted on DORIS DAC page	Equity and Inclusion Specialist/ Secretary's Office/HR/DAC	Annually
Encourage recognition and rewards	<ol style="list-style-type: none"> <li>Specify that DMC/DERA eligibility is not impacted by a reclassification/promotion within the year</li> <li>Share division parameters for disbursement of DMCs - allows staff to aim for those expectations</li> <li>Recognize champions of DEI publicly with DEI awards and publicize on monitors, in Stay Connected, etc.</li> <li>Look for demographic trends in DMC awards given</li> </ol>	<p>Recognition and rewards reflect the make-up of the employee workforce</p> <p>Track % of diversity year to year</p>	<p>Divisions will share expectations for DMC awards annually</p> <p>Annual DEI awards will be communicated broadly</p>	SO/Equity and Inclusion Specialist/ HR/ESD/DTS	Check on progress quarterly
Provide opportunities for staff to speak freely to managers	<ol style="list-style-type: none"> <li>360° evaluation for managers</li> <li>Analyze exit data for those responses related to management to identify potential areas of concern</li> <li>Continue office hours with senior leadership</li> <li>Continue allowing feedback during 1:1 meetings</li> <li>Promote Diversity Advisory Council (DAC), Staff Relationship Advisory Council (SRAC), and Employee Resource Groups (ERGs) as part of the feedback loop</li> </ol>	Employees will have opportunities to provide feedback to managers and leadership	<p>100% of employees will be given the opportunity to provide feedback</p> <p>100% of employees complete 360° surveys</p>	SO/Equity and Inclusion Specialist/ HR/DTS/Divisions	<p>Check on progress quarterly</p> <p>360° process: Targeted completion date June 2024</p>
Train and promote internal candidates	<ol style="list-style-type: none"> <li>Offer Individual Development Plans (working w/ sup) to staff who are interested using a standard format across the agency</li> <li>Promote the Connectors group and encourage sharing of job descriptions and upcoming openings across divisions</li> </ol>	Internal candidates are promoted within the agency	<p>Increased % of positions filled with internal candidates</p> <p>Individual Development Plans are offered to employees</p> <p>Develop a job shadowing program for a classification with a high vacancy rate (i.e. Field Auditor)</p>	Bureau Section Chief & Senior Leadership	<p>Check on progress quarterly</p> <p>Target completion for program updates/ processes: June 2024</p>

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
	<ol style="list-style-type: none"> <li>3. Explore expanding the Gateway program to include other tax types if feasible or switch between tax types annually</li> <li>4. Develop a job shadowing program</li> <li>5. Explore opportunities for movement within the agency in lieu of resignation/termination</li> <li>6. Expand on CAS-in training and lead worker-in training to other classifications with high turnover</li> </ol>		Ratio of openings to transfers		
Identify and require DEI training for managers and supervisors	<ol style="list-style-type: none"> <li>1. Provide annual DEI training for supervisors/ managers</li> <li>2. Include an expanded DEI training for new supervisors</li> </ol>	New managers and supervisors have DEI training	DOR will request DEI training as a required new supervisor training (expanded, focused for supervisors)	Equity and Inclusion Specialist/HR/DTS	Target completion date June 2024
Identify compensation policies that impact DEI and mitigate impacts where possible	<ol style="list-style-type: none"> <li>1. Higher cost of living in some of our locations (Milwaukee)</li> <li>2. Parking fees by location/private parking</li> <li>3. COLA</li> </ol>	Recommendations made in the compensation plan process	<p>Compare parking costs by location &amp; turnover</p> <p>Track parking increases by location</p> <p>% of people leaving each location (correlation to cost of living)</p>	Equity and Inclusion Specialist/Senior Leadership/HR	<p>Check on progress quarterly</p> <p>Recommendations target date: September 2024</p>
Welcome Committee and onboarding for all new employees in each district office.	<ul style="list-style-type: none"> <li>• Clean and Decorate cubicles and display name of cubicles.</li> <li>• Create packets with treats, office supplies, etc.</li> <li>• Provide an informational brochure that list all DOR committees, resources, and other important information for new employees.</li> <li>• Provide a meet and greet list to new employees.</li> <li>• Display a welcome message to all new employees and their names on TV monitors in all offices.</li> <li>• Appoint welcome/onboarding ambassadors in each district office.</li> </ul>	Welcome Committee/Ambassadors to track all new employees onboarding activities.	<p>Decrease in voluntary terms terminations.</p> <p>Survey new employees about onboarding process for continuous improvement.</p> <p>Annual Engagement survey to be sorted by years of service to determine how employees are feeling about their position.</p> <p>Attach a survey to annual and probation performance evaluations to share their employee experience at DOR.</p>	<ul style="list-style-type: none"> <li>• Managers</li> <li>• Supervisors</li> <li>• Appointed ambassadors.</li> <li>• Welcome Committee members</li> <li>• HR staff</li> </ul>	September 1, 2024
Mental Health Awareness and Well-Being training	<ul style="list-style-type: none"> <li>• Hold annual or biannual trainings of mental health awareness (how it impacts the employee).</li> </ul>	Partner with EAP to provide trainings on various topics related to wellbeing and mental health awareness.	Required annual trainings for all staff members to bring awareness to mental health in the workplace.	<ul style="list-style-type: none"> <li>• All DOR staff.</li> <li>• EAP – Kepro</li> <li>• Human Resources</li> </ul>	February 28, 2024



Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
	<ul style="list-style-type: none"> <li>Partner with EAP to bring in a presenter to hold trainings on mental health and wellbeing for all employees.</li> <li>Separate required training for managers and supervisors on how to recognize and deal with employees experience mental health issues.</li> <li>Promote tagline "ICU and Support U" throughout the department.</li> </ul>		Promote tagline "ICU and Support U" throughout the department through tv monitors and flyers and on DORIS		
Visibility and accessibility to senior leadership and directors.	<ul style="list-style-type: none"> <li>Senior leadership &amp; Directors to host virtual or in person coffee hour (monthly or quarterly).</li> <li>Senior Leadership to hold townhall meetings to provide transparent and pertinent information regarding the department strategic goals and future visions.</li> <li>Senior Leadership &amp; Directors to show individualized appreciation through personalized emails/hand-written notes to staff members.</li> <li>Senior leadership/directors adopt open door policy when it comes to communication.</li> <li>Senior Leadership to continue holding and promoting existing office hours.</li> </ul>	All senior leadership engaging with employees at least quarterly.	Promote open discussions quarterly with senior leadership in person and virtually. Display office hours in DOR communications emails, tv monitors, and DOR All communication platforms	<ul style="list-style-type: none"> <li>Secretary</li> <li>Deputy Secretary(s)</li> <li>Division Administrators &amp; Deputies</li> <li>Directors &amp; Deputies</li> </ul>	January 1, 2024
Build a DOR Community	<ul style="list-style-type: none"> <li>Create and implement interest-based groups like book clubs, gardening clubs, culinary club, etc. to promote networking and relationship building.</li> <li>Partner with ESD to provide managers/supervisors with team building training.</li> <li>Allow each unit/section to hold off-site team building activities.</li> <li>Partner with connectors committee to promote events, variety of topics, and other departmental information.</li> </ul>	Onboarding/welcoming to take place throughout employees first month.	Build a sense of community throughout DOR with the formation of interest-based groups and team building activities across each division and bureau.  Survey participants	All DOR Staff including senior leadership.	May 1, 2024
Enhance Employee Recognition Program	<ul style="list-style-type: none"> <li>Peer-to-peer recognition (highlight and promote more)</li> <li>Leadership to send virtual high fives or fist bumps to staff members.</li> <li>Implement Employee of the Month and Year.</li> </ul>	Employees to be recognized each month and at the end of the year.	Employees feels valued and respected and wants to stay with DOR.  Employee Engagement ratings pertaining to respect and value.	<ul style="list-style-type: none"> <li>Secretary</li> <li>Deputy Secretary(s)</li> <li>Division Administrators &amp; Deputies</li> </ul>	September 1, 2024

Recruitment Strategy	Action	KPI	Outcome/Metric	Responsible Staff/Office	Targeted Completion Date
	<ul style="list-style-type: none"> <li>• Have awards for ideal team players, customer advocacy, diversity, engagement champion.</li> <li>• Recognition can be done publicly or privately and should include trophies, certificates, and other small prizes.</li> </ul>		Employee Engagement survey results need to be more transparent to all staff members.	<ul style="list-style-type: none"> <li>• Directors &amp; Deputies</li> <li>• Employees</li> </ul>	

<b>Associated Culture Staff Training</b>	<ul style="list-style-type: none"> <li>• Managers and supervisors' mental health and wellbeing training.</li> <li>• Employee well-being and mental health training</li> <li>• Team building/activities training for managers and supervisors.</li> </ul>
--	--

## VII. Internal and External Communication of Equity and Inclusion Plan

- A copy of this 2023-2026 Equity and Inclusion Action Plan will be available to all DOR staff on the department's intranet site, (DORIS), and will be emailed to all DOR staff by the Secretary's Office.
- The DOR will host a virtual "lunch-n-learn" to announce the Action Plan and highlight the contents of the plan. In the future, updates regarding the Action Plan will be shared during the "Catch Up with Barca" meetings.
- A physical copy of the Agency's Equity and Inclusion Action Plan will be available to employees by emailing the Equity and Inclusion Specialist at [racheal.harris@wisconsin.gov](mailto:racheal.harris@wisconsin.gov).
- DOR will also use our internal monitors for updates on this E&I Action Plan. DOR will also develop messaging to populate on the internal monitors to highlight the importance of the Action Plan, and reinforce the values of Diversity, Equity, and Inclusion.
- DOR will seek to identify posters to display prominently in all of the district offices where they are visible to employees that reinforce the message of non-discrimination, equal opportunity, diversity, equity, and inclusion.
- The agency's Equity and Inclusion Plan is available on the agency's public website at [DOR Wisconsin Department of Revenue Portal](#) or in a print copy to anyone who requests it. As requested, the agency will make the plan available in alternative formats such as email.
- A physical copy of the Equity and Inclusion Plan will be available to contractors, vendors, and members of the public at the following address: [DOR Wisconsin Department of Revenue Portal](#).
- DOR will encourage staff to provide feedback regarding the E&I Action Plan to be directed to the Diversity Advisory Council.
- 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."
- 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.

## **VIII. Agency Internal Monitoring Plan and Process**

### **Agency Monitoring**

The Equity and Inclusion Action Plan is a guiding document that will help frame and direct the equity and inclusion work of DOR, preceded by a vision for its implantation and integration, as well as the accountability measures, tracking, and reporting that will bring these goals to light.

### **Internal Monitoring of Equity and Inclusion Plan:**

The Deputy Secretary will meet monthly with the Equity and Inclusion Specialist, the Region 4 Equity and Inclusion Program Officer and the Human Resources Director to review the agenda for executing the strategies of the Action Plan. The three will work together that there is forward movement on the strategies that are considered priority, and together they will map out a timeline to accomplish the goals in the Action Plan.

The Equity and Inclusion Specialist, Region 4 Equity and Inclusion Program Officer, and Human Resources Director will be invited once per quarter to discuss the progress of the Action Plan.

At least annually, the Equity and Inclusion Specialist , Region 4 EIPO and Human Resources Director will meet with the Secretary's Office and separately with each of all of the Division Administrators to review the progress and challenges relating to the agency's Equity and Inclusion Plan in their specific Division, and to garner feedback for consideration of changes to the Plan. More frequent meetings may be scheduled as necessary to keep the strategies within the Equity and Inclusion Action Plan moving forward.

Appendix A

DOR Mission Vision Values



Wisconsin Department of  
**Revenue**

### Living the Values

# Inclusivity

*It's hard enough to understand government regulations without a language barrier. I admire DORs commitment to translation services.*

- Laura Villaron

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security



Wisconsin Department of  
**Revenue**

### Living the Values

# Innovation

*Innovating the customer experience fosters stronger connections to the Wisconsin Lottery brand. By continually innovating we increase property tax relief for Wisconsin home owners.*

- Zach Hyde

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security



## DOR Mission Vision Values



### Living the Values

# Integrity

*I changed from private sector to public servant because it was very important to me to do a job with meaning.*

- Samantha Spaulding

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security



### Living the Values

# Knowledge

*It takes a village and I'm grateful for the time and effort coworkers take to pass along knowledge. I am excited to learn and apply that knowledge throughout my career.*

- Nakeeta Giebel

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security

DOR Mission Vision Values



Wisconsin Department of  
**Revenue**

**Living the Values**  
**Empathy**

*Being honest, gracious and respectful to co-workers and taxpayers builds strong trust. That allows for open communication and dialogue.*

- Doug Thompson

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security



Wisconsin Department of  
**Revenue**

**Living the Values**  
**Security**

*Your password is like your toothbrush - don't forget it, change it often, and don't share it with strangers.*

- Marifel Moeller

**Values**  
Integrity Knowledge Innovation Empathy Inclusivity Security

## Appendix B

### DOR Demographics

Workforce Diversity	Total	Madison	Milwaukee	Green Bay	Wausau	Appleton	Eau Claire	Edina	Glenn Ellyn	Onalaska
<b>Total Employees</b>	1111	771	129	40	28	39	58	16	21	9
<b>White</b>	883	628	82	33	25	33	52	10	12	8
<b>American Indian</b>	11	4	1	5	0	0	1	0	0	0
<b>Asian</b>	67	47	4	0	1	2	2	4	6	1
<b>Black</b>	70	43	23	0	0	1	0	2	1	0
<b>Black, White</b>	4	2	2	0	0	0	0	0	0	0
<b>Hispanic</b>	51	31	14	0	0	2	1	0	2	0
<b>Pacific</b>	1	0	1	0	0	0	0	0	0	0
<b>Non-specified</b>	24	16	1	2	2	1	2	0	0	0
<b>Veterans</b>	56	38	7	3	2	0	5	0	0	1
<b>Disability</b>	104	73	10	2	3	5	7	0	3	1
<b>Severe Disability</b>	8	5	2	0	0	1	0	0	0	
<b>Females</b>	587	401	73	18	17	22	31	12	7	6
<b>Males</b>	526	370	56	22	11	19	27	4	14	3



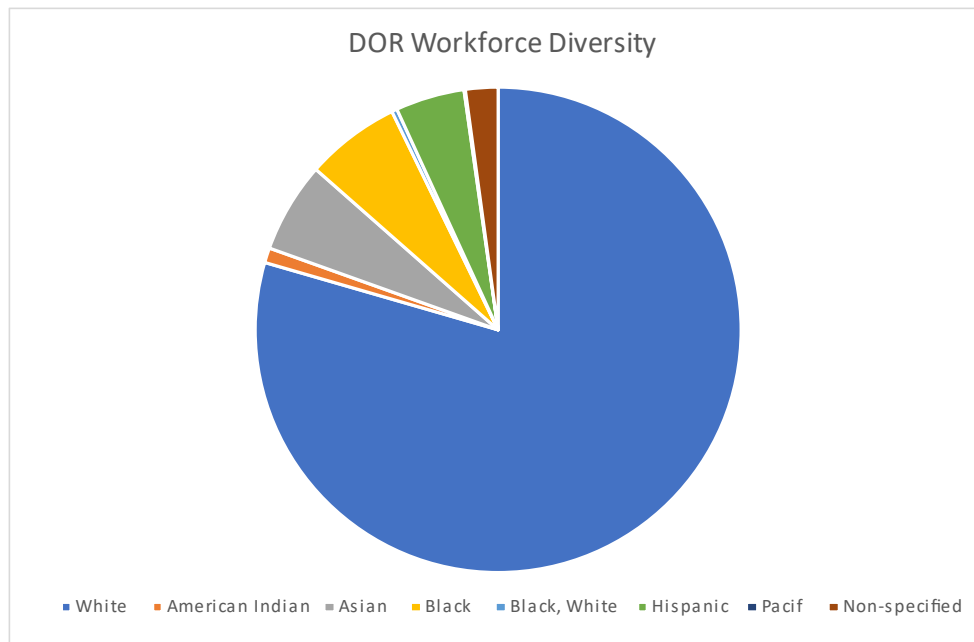
As of 8/10/23 RH

Racial/ethnic minorities (incl non-specified) 21%

Racial/ethnic minorities (excl non-specified) 18%

Women 53%

Veterans 5%



## Appendix C

### Soar Racial Justice Delivery Team List of Recommendations and status as of September 1, 2023

Recommendation	Send to:	Status
Outreach beyond the dept. to high schools, Tribes, Hmong population , Boys and Girls Club.	Equity and Diversity Officer	On-going efforts. Tribal training is conducted annually. Different outreach efforts are conducted by different divisions/bureaus
Help identify obstacles		On-going efforts
Make racial justice training part of annual training for supervisors	Equity and Inclusion Taskforce	2022 All Staff conference included a session on Unconscious bias. On-going. Each division/bureau conducts their own annual training.
Incorporate DEI into performance evaluations	Equity and Diversity Officer	Completed
Create webpage to promote, celebrate, track and report on DEI topics	Equity and Diversity Officer Diversity Advisory Council	Completed. DORIS contains information on DEI training and ERG info.
Have compliance field agents conduct outreach to small business groups - specifically about staying compliant with tax laws. i.e. Seminars with Urban League, other groups. Preventative seminars - Have Speakers bureau discuss bank levies and wage attachments	Compliance Bureau	Completed. Small Business Outreach group has been established and conducted many sessions with smaller/ethnic chambers of commerce
FAQs in more than one language	SOAR Multilingual Team	Completed. Information on website is available in Spanish and Hmong. Information in other languages is available upon request. Through SOAR, DOR built a multi-lingual team to assist with translations.
Yearly training for all workforce on diversity issues- similar to UW course	ELM Course completed	Completed. DOR Supervisors were required to complete DEI training. Supervisors continue with "Wellbeing at work" training.
More leadership training programs for aspiring supervisors/managers. Identifying the rising stars for mentoring/readying for upward mobility.	Equity and Diversity Officer Secretary's Office	Completed. The Emerging Leaders program seeks to identify and train potential future leaders. Efforts are made to ensure each class contains diverse leaders, and those from district offices.

Recommendation	Send to:	Status
Training on career paths	Diversity Advisory Council Nuts and Bolts Subcommittee	On-going efforts. The DOR is working towards offering Individual Development Plans for employees. Many divisions offer opportunities for other DOR employees to learn about opportunities in their division.
Create a list of organizations to partner with – Jr. Achievement	Equity and Diversity Officer ERG	On-going efforts. The DOR would also like to expand the high schools that we partner with for VITA programs.
HR Hacks – brown bags on important HR topics	Diversity Advisory Council Nuts and Bolts Subcommittee	Completed. Our DPM staff has rolled out a training program to train staff on the various HR-related topics. HR Hot Topic in 30 presentations.
DEI included in new employee orientation	Equity and Diversity Officer	Completed. Our Equity and Inclusion staff are featured in each New Employee Orientation.
Ask each NEO speaker to include DEI in their discussion	NEO Training Coordinator	Completed. All NEO speakers were asked to include a statement on the importance of DEI.
Give new employees a time frame for completing the DEI training	Equity and Diversity Officer	Completed. DEI training is tracked in cornerstone.
Checklist on DORIS regarding DEI training	Diversity Advisory Council	On-going effort. DEI training is offered and tracked in cornerstone.
Create rated list on DORIS for Udemy - offered DEI courses - as a resource	Diversity Advisory Council	On-going effort. There are already reviews regarding certain trainings that are offered.
Create an outreach recruitment committee, to have a broader pull of individuals outside of DAC	Equity and Diversity Officer	On-going efforts. VIP recruitment team utilizes Teams to recruit volunteers to participate in recruitment efforts.
Employee Resource Groups	Equity and Diversity Officer	Completed. DOR currently has 6 Employee Resource Groups
Look at resources offered by local governments as a race/equity alliance and apply at DOR ( <a href="https://www.racialequityalliance.org/">https://www.racialequityalliance.org/</a> )	Equity and Diversity Officer	On-going efforts. Policies on DEI should be continuously reviewed.

## Thoughts/Acknowledgements

I really enjoyed working on the 2023-2026 Action Plan. I would like to thank everyone who contributed to the success of this document and plan.

- Maria Guerra Lapacek

I really appreciate WIDOR's continued commitment to equity and inclusion.

- TaMeesha Hudson

I enjoyed being part of the E&I Task Force. I enjoyed reviewing the statistics behind E&I, being able to learn about different perspectives and viewpoints, and then taking the information and creating a plan for improvement. I appreciate everyone's time and efforts in the process.

- Amy Mercer

I appreciate the opportunity to work with the E&I Taskforce on the topic of recruitment. I value the ideas put forth by everyone involved about how we can better reach a larger diverse population. I felt welcomed in the groups discussions and felt like my opinion was heard and taken into consideration.

- LoToya Murray