WISCONSIN HISTORICAL SOCIETY

State of Wisconsin

Wisconsin Historical Society Equity and Inclusion Plan

January 1, 2024–December 31, 2026

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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 and 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.

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12/02/2023

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JILL MOKSOUPHANH 11/22/2023

Date of submission to DPM/BEI: Submitted 9/08/23, Resubmitted 10/30/2023.

Each individual or group listed below contributed to the planning and development of the EI plan and will contribute to its implementation.

- Jill Moksouphanh, Workforce and Culture Program Officer
- Laura Tetting, HR Director (EI Officer)

Equity and Inclusion Committee (IDEA Team)/Planning, Development, and Implementation Team

Michelle Kamke – Communications Coordinator, Hannah Hankins – Annual Giving Coordinator, Laurel Miller - Manager of PK-12 Museum Education (Wisconsin Historical Museum), Jenna Loda Eddy – Box Office Manager, , Kate Melberg – Youth Experience Coordinator (Wisconsin Historical Museum), Benjamin Lillge - Circulation Assistant, Sarah Taylor – Assistant Collections Manager, Abigail Behrends – Microfilms Archivist, Amy Wyatt – Deputy State Historic Preservation Officer, Elizabeth Hilton – National Register Coordinator, Emmy Keller – IT Project Manager, Laura Tetting – HR Director, Jill Moksouphanh – Workforce and Culture Program Manager, Maria Parrott-Ryan - Press Senior Editor of K-12 Publications, Jennifer Roades, Executive Staff Assistant.

Society Leadership Team:
Christian W. Øverland - The Ruth and Hartley Barker Director & CEO, Wes Mosman Block - Deputy Director & Chief Operating Officer, Angela Titus - Assistant Deputy Director & Chief Program Officer, Rachel Byington- Tribal Liaison, Daina Penkiunas - State Historic Preservation Officer, Kate Easton - Legislative Liaison, Kelly Frawley - Director of Facilities Planning and Management, Jeannine Sherman - Director of Marketing, Nicolas Hoffman - Administrator, Division of Museums and Historic Sites, Julie Lussier - Executive Director, Wisconsin Historical Foundation, Kelli Ka'alele - Sr. Director of Business Services, Bobby Marshment-Howell - Chief Information Officer, Jennifer Roades - Executive Staff Assistant, Laura Tetting - Director of Human Resources, Shannon Wendt - Director of Finance and Policy, Colleen Lies - Assistant Director of Strategic Communications, and Maggie Marconi - Deputy Administrator Division of Museums and Historical Sites.

Wisconsin Historical Society
Equity and Inclusion Commitment Letter

The Wisconsin Historical Society and Foundation (hereafter referred to as WHS) who's mission to connect people to the past by collecting, preserving, and sharing stories, 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, sexual orientation, sex identity, religion, national origin, age, disability, genetic information, or marital status.

The WHS is firmly committed to meeting the state laws and policies and federal laws for equal employment opportunity and affirmative action. WHS 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, and to Wisconsin Historical Foundation employees where applicable.

As part of the WHS's commitment to this overall process, we intend to apply equity and inclusion principles to all employment policies, procedures, and programs. To ensure equal employment opportunity and freedom from discrimination, including recruitment, selection, job assignment, training, compensation, benefits, discipline, promotion, transfer, layoff, and termination processes. Employees and applicants with disabilities will receive reasonable accommodation.

WHS has developed and committed to maintaining a written Equity and Inclusion Plan. This Equity and Inclusion Plan has our total support, and the WHS 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 WHS to aid in the implementation of this program and be accountable for complying with the objectives of this Equity and Inclusion Plan. WHS will maintain a monitoring and reporting system to ensure compliance with the equity and inclusion mandates. The plan is available for review on the WHS 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: Christian W. Øverland

Signature:

Date: 12/2/2023

HR Director (EI Officer): Laura Tetting

Signature: Laura Tetting

Date: 11/29/2023

Workforce and Culture Program Officer: Jill Moksouphanh

Signature: JILL MOKSOUPHANH

Date: 11/22/2023

Introduction (Alignment with Vision, Mission, and Values)

The Wisconsin Historical Society and Foundation (hereafter referred to as WHS) is committed to being a diverse, equitable, inclusive, and accessible organization because we truly believe this is the most effective way to attract, engage, and retain the best talent and the most meaningful way to serve Wisconsin's diverse population and communities. The unique characteristics and abilities of each employee are part of the fabric that helps make WHS an exciting, enriching environment in which to work.

This is exemplified in the **WHS Mission, Vision, Core Values, and Strategic Framework**.

MISSION: The Wisconsin Historical Society connects people to the past by collecting, preserving, and sharing stories.

VISION: Enriching and transforming lives through unparalleled access to history.

CORE VALUES:

- **Embrace a Spirit of Service** - *Willing to help others – whether they reach out or an opportunity arises – for the good of the whole. The whole could be the WHS, our constituents, Wisconsin communities, and beyond.*
- **Engage Our Expertise** - *Reach across divisions to harness others' diverse skills, talents, and knowledge to produce high quality work. Be resourceful in the pursuit of new knowledge and ideas. Our collective expertise is a buildable, shareable, and usable resource. These ideas can include breaking down barriers, building opportunities, cultivating community connections, and enhancing our state's legacies as the WHS moves "Forward."*
- **Spark Enthusiasm** - *Approach our work with passion and dedication to inspire others and make transformative change. Champion the programs and projects that are important to our coworkers, stakeholders, and community members.*
- **Cultivate Inclusion** - *Create and foster a safe and welcoming environment for all people and communities. Commit to making the WHS an equitable, diverse, inclusive, and accessible community. Our dedication to inclusion extends to the stories we collect, preserve, and share, and our relationships with the diverse communities in Wisconsin.*
- **Exceed Expectations** - *To the best of our abilities and resources, provide support to colleagues, stakeholders, and communities that allow us to rise to the challenges of being a premiere North American history organization.*
- **Think Big and Grow with Purpose** - *Chart a sustainable organizational future through commitment to our organizational values with a critical eye to our past and our present. Work in innovative ways that prioritize and cultivate curiosity, vision, and creativity*

We use the Core Values to guide the work that we do across all areas of WHS. Diversity, Equity, Inclusion, and Accountability (DEIA) is a top priority for our employees and for the communities in which we partner, which is especially evident in our value to ***Cultivate Inclusion***, as described above.

WHS Strategic Framework

1. Expand the stories we collect, preserve, and share
2. Ignite a Digital Transformation
3. Strengthen and sustain connections to history statewide, and beyond
4. Modernize our Workplace and Workforce Culture

WHS has worked extensively to build a Strategic Framework to provide priority, direction, and accountability to agency operations. Each division and the Foundation developed goals and action items to align with these strategies. Where applicable, items identified in division strategic planning have been included on the EI plan for awareness, tracking and measuring.

Internally, strategic goals for current and future WHS employees include:

Modernize our Workplace and Workforce Culture

- *Develop recruitment strategies that attract a diverse and capable workforce*
- *Empower employees to feel greater ownership for their work*
- *Improve the utilization of our workspace to increase employee experience and effectiveness*
- *Ensure clear and consistent internal communications at all levels of the organization to provide clarity on priorities and initiatives*
- *In alignment with WHS values, develop and communicate standards and expectations for how we communicate, collaborate, and support our colleagues and teams*

Ignite a Digital Transformation

- *Invest in technology that increases accessibility to our collections – digital assets, content, website, etc.*
- *Leverage data to drive decisions and improve operations – workforce, financial, programmatic*

Critical to the success of overall workforce culture strategy, the Workforce and Culture Program Officer, HR, WHS Leadership, the Agency Equity and Inclusion Committee (IDEA Team), and other workgroups collaborated to develop, and will implement, the 2024-2026 Equity and Inclusion Plan as outlined in Ch 43. to ensure equal opportunity and to advance DEIA strategies in recruitment, retention, and agency culture.

To assist with this effort, WHS recently hired a new Agency Equity and Inclusion Program and Policy Manager (Workforce and Culture Program Officer) in May 2023 to coordinate and advance DEIA in recruitment, retention, and agency culture, along with developing and implementing a comprehensive employee engagement strategy. This is in addition to the duties of the HR Director (EI Officer), which include ensuring equal opportunity in recruitment and selection, overseeing respectful workplace, FMLA, and reasonable accommodation policies, and other responsibilities related to EI, such as onboarding, offboarding, and leveraging data to drive decision making. HR is currently in the process of developing and leveraging data dashboards to assist in recruitment efforts.

WHS also built more structure around the roles and responsibilities of the IDEA Team in spring of 2023, developed a comprehensive charter, and recruited several additional members (a 200% increase in membership). This re-energized team, which, also functions as the Planning, Development, and Implementation Team, met in the summer of 2023 to develop, and recommend goals, strategies, and action items for inclusion in the 2024-2026 EI plan related to recruitment, retention, and agency culture. The Workforce and Culture Program Officer, the HR Director (EI Officer), the WHS Directors, and the WHS Senior Leadership Team (SLT) were also given the opportunity to recommend goals, strategies, and action items incorporated into the plan. The contributions from both the IDEA Team, subject matter experts, leadership, and also the analysis of workforce data and feedback were important to strengthen the overall plan and ensure buy-in as the plan is implemented over the next 3 years.

Through collections, and externally, strategic goals include:

Expand the stories we collect, preserve, and share.

- *Fulfill state, federal, and public service mandates*
- *Deliver mission-based experiences*
- *Open the new Wisconsin History Center*
- *Enhance the experiences at our historic sites and throughout the state*

Strengthen and sustain connections to history statewide, and beyond through:

- Community engagement and participation
- Relationships with partners, stakeholders, affiliate organizations, and PK12 education
- Increased advocacy and philanthropic support

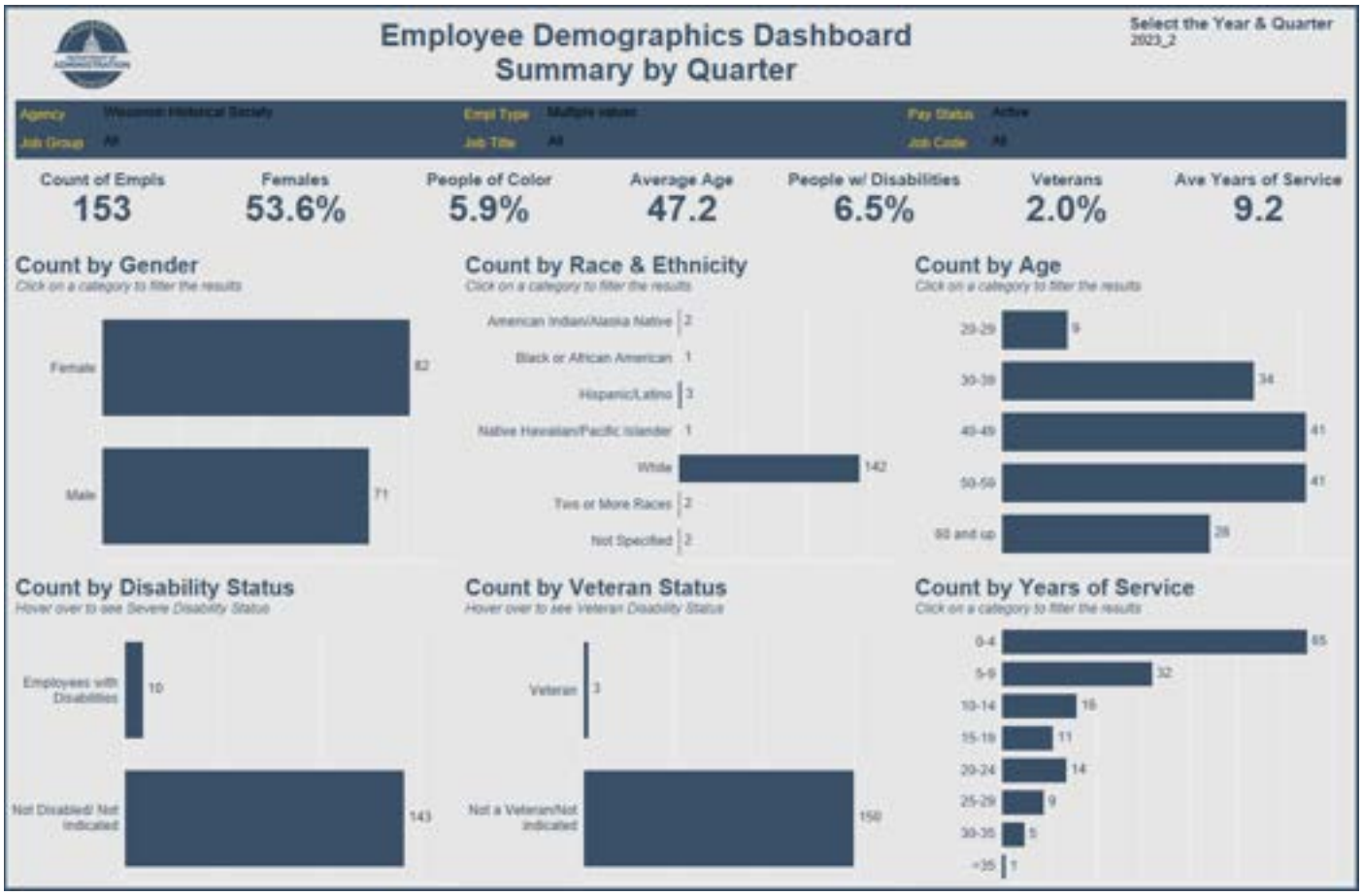
Our Division of Museums and Historic Sites (DMHS), Programs and Outreach Division, and Library, Archives, Museums Collections (LAMC) Division mainly own these goals and action items, as they relate to DEIA, and have the responsibility to implement and measure results. However, they have been added to the EI Plan for awareness and tracking purposes. One outcome we strive for is that by strengthening connections to communities, telling of inclusive stories, and ensuring underrepresented stories are told, this will open a pipeline for current and future recruitments; That this inclusiveness will attract individuals from all diverse backgrounds who want to engage with WHS and be part of this journey.

WHS Workforce Analysis Summary

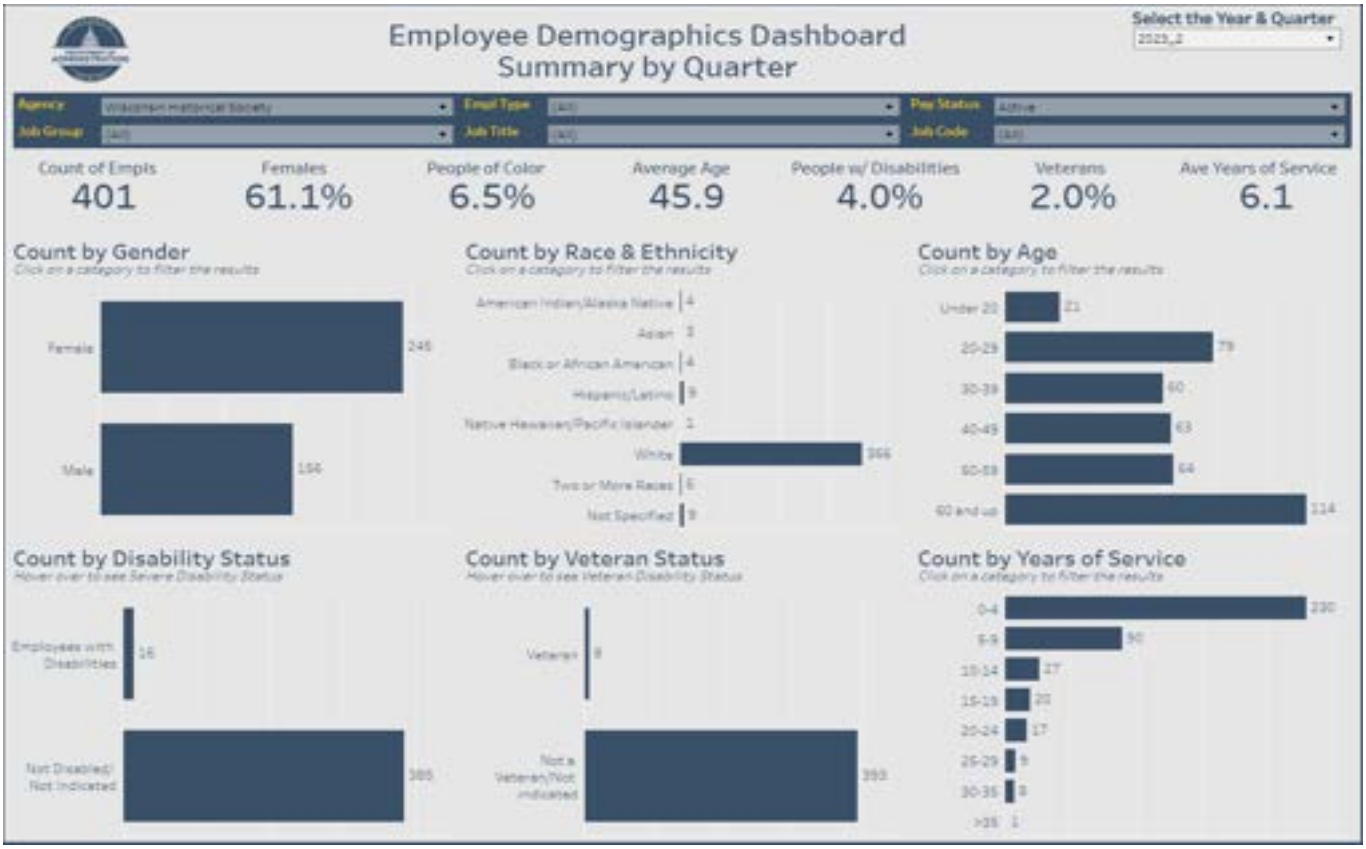
Quantitative and qualitative workforce data summaries, and corresponding analysis are listed below. The resources used include data from reports provided by DOA-DPM-Bureau of Equity and Inclusion, and data that has been collected internally through surveys, table exercises and listening sessions.

DOA Employee Demographic Dashboard Summary

Permanent, Unclassified – Q2 2023



All Employee Types (LTE, Permanent, Unclassified, Project) – Q2 2023



WHS Workforce, State of WI Workforce, and State of WI Census Comparison

WHS Workforce Data Analysis – Percent Racial/Ethnic Minorities and Women, Persons with Disabilities*			
	Persons with Disabilities*	Women	Racial/Ethnic Minorities
WHS - all EE types (Q2 2023)	4.0%	61.1%	6.5%
WHS - permanent, unclassified (Q2 2023)	6.5%	53.6%	5.9%
State of WI Workforce (2022)	7.5%	52.2%	15.3%
State of WI Census (2020)	8.1%	49.8%	19.6%

*self-reported

References: DOA Employee Demographic Dashboard (previous charts), State of Wisconsin Classified Workforce & Affirmative Action , FY2021-2022, https://www.census.gov/quickfacts/fact/table/WI/PST045222

The dashboard data and the workforce data comparison demonstrate WHS employs:

- *1.0% less persons with disabilities* (permanent, unclassified) than State of WI workforce*
- *1.4% more woman (permanent, unclassified) than State of WI workforce*
- *10.2% less racial/ethnic minorities (permanent, unclassified) than State of WI workforce*

WHS has made significant strides in telling Wisconsin history through an inclusive lens and has expanded its outreach to more and more communities. One outcome we strive to achieve is for

WHS to be an attractive employer for individuals from all backgrounds because they see themselves represented in the work that we do. WHS will continue its efforts to recruit and hire racial/ethnic minorities. All FTE recruitments are under the assumption that the position is underutilized.

State Underutilization Report 2023
As identified in the State Underutilization Report 2023, minorities were underutilized in job group 195 – Administrative Support, specifically for WHS in 2020. As of 2023, this has been remedied. Women were underutilized in job code 044 – Planning, Policy, and Research, specifically in WHS in 2023. Though all FTE recruitments are considered underutilized, WHS will pay specific attention to this job classification.

WHS Employee Engagement Surveys
Data from 2019-2022 employee engagement surveys were analyzed and areas that fell below a response score of 7 out of 10 were considered areas in need of focus. Based on 2022 survey responses, in summary, the areas in need of focus include:

- Fostering an environment that promotes open and candid communication and feedback throughout all levels of the employees and the organization.
- Increasing professional development and growth activities.
- Ensuring staff have the capacity and resources needed to do their work effectively, find their work rewarding, and feel valued for their expertise.

All Staff Conference Feedback
In January 2023, WHS held an all staff conference, in which staff participated in table exercises to provide feedback and solutions to items in need of focus from the 2022 Employee Engagement Survey. Staff focused this exercise on feedback/recognition, staff capacity, communication, and professional development. The feedback and solutions identified in this exercise were considered and used to develop the 2024-2026 EI plan.

Individual Listening Sessions
IDEA Team Members and Division of Business Services Directors, and Division Administrators
In May 2023, the new WHS Workforce and Culture Program Officer met with all WHS Directors, Division/Office Leaders, Division of Business Services Directors, and members of the IDEA Team individually to get their perspective of workforce culture related strengths and pain points within their area, which were taken into consideration and used to develop the EI plan. In summary:

- *Strengths:* Universally, the strength voiced over and over is committed, passionate, and capable staff.
- *Pain Points*: Lack of attracting qualified, diverse candidates through current outreach efforts (many need specialized degrees); Desire for stronger communication and transparency and acting on feedback from leadership; Increased stress and burnout due to vacancies/lack of resources; Reactive instead of proactive approach to planning; Difficulty in recruiting, hiring, and onboarding seasonal staff.

By holistically reviewing and analyzing data and employee feedback from multiple sources, this gives WHS a baseline in which to build its 2024-2026 Equity and Inclusion Plan.

Equity and Inclusion Strategic Plan
Wisconsin Historical Society- Goals and Strategies

WHS identified broad goals from our workforce analysis to address barriers to advancing equity and inclusion in each equity and inclusion focus area. Once those goals were identified, strategies to address the barriers were developed. Each strategy chosen is included in the WHS EI Workplan.

Overarching Goals	Strategies to Achieve Goals
Recruitment Goal *WHS will commit to recruiting and hiring talent from all diverse backgrounds because this is the most meaningful way to serve Wisconsin's diverse population and communities.*	• Promote equal opportunity in recruitment and selection by reviewing current job postings template, rating/interview panel instructions, and recruitment and selection practices and processes for State of Wisconsin classified, and project employees through a diversity equity and inclusion (DEIA) lens. • Empower supervisors, HR, and interview/rating panelists with training and an awareness on recruitment and selection with DEIA lens and why it is important • Source new recruitment partners to expand reach of audience for job announcements. • Promote WHS as a great place to work • Review LTE hiring process and provide direction to hiring supervisors on hiring through a DEIA lens • Through community engagement, collecting, and collaboration, ensure inclusive and underrepresented stories are told in all aspects of our work, making WHS an attractive employer for individuals who see themselves in these stories • Strengthen relationships with community organizations, informal networks, local history affiliates, and post-secondary educators – a pipeline to both current and future talent pools
Retention Goal *WHS will create an environment that fosters a diverse, inclusive, equitable, and engaging workplace where staff feel heard, valued, and empowered at all stages of the employee lifecycle.*	• Develop, implement, and communicate a comprehensive employee engagement strategy and corresponding action plan that is measurable and based on data. Employee engagement factors include leadership and internal communications; diversity, equity, inclusion, accessibility (DEIA); health, wellness, and connectedness; training and development; recognition; and continuous improvement. • Strengthen onboarding and orientation processes • Use exit surveys to analyze trends in reasons for leaving, especially for underrepresented groups
Agency Culture *WHS will promote an agency culture free of bias; a respectful culture that values diversity, promotes equity, actively engages inclusion, and ensures accessibility.*	• Provide awareness to internal staff of the inclusive stories being collected and told, and the of the expanded community outreach that WHS is doing externally • Empower and support the IDEA Team to act as an advocate and a resource for equity and inclusion in the agency and to promote DEIA awareness, training, programming, and events • Communicate more broadly respectful workplace policies, and improve staff ability to report issues • Build awareness in DEIA and why it matters

WHS Equity and Inclusion Strategic Plan – Workplan

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

Recruitment Goal: *WHS will commit to recruiting and hiring talent from all diverse backgrounds because this is the most meaningful way to serve Wisconsin's diverse population and communities.*					
Recruitment Strategies	**Actions**	**KPI**	**Outcome/Metric**	**Responsible staff/office**	**Targeted Completion Date**
Promote equal opportunity in recruitment and selection by reviewing current job postings template, rating/interview panel instructions, and recruitment and selection practices and processes for State of Wisconsin classified and project employees through a diversity equity and inclusion, and accessibility (DEIA) lens.	Establish a workgroup of subject matter experts (SMEs) involved with the recruitment process, at the direction of HR, and trained in DEIA to review documents, practices, and process in the recruitment and selection process for State of Wisconsin, classified and project employees	Workgroup members attend training on equity and inclusion in hiring	100% workgroup members trained	Laura Tetting – HR Director Jan Zadra – HR Specialist Jill Moksouphanh – Workforce Culture Program Manager Workgroup of SMEs - TBD	Sept 2024
		Committee will review and implement changes	100% recruitment and selection documents, practices and processes will be reviewed with DEI lens and changes implemented as necessary		December 2025
Source new recruitment partners to expand reach of audience for job announcements.	Leverage Programs and Outreach, and Collections divisions resources to identify partnerships	Programs and Outreach and/or Collections will identify 5 partnerships in the first year, and then at least 1 annually	Database created, used and maintained to expand outreach to underrepresented applicant groups	Jill Moksouphanh – Workforce and Culture Program Officer Kate Thompson – Press Director Janet Seymour – Outreach Director Outreach and Press representative/SME – TBD Collections and Curatorial representative/SME - TBD	July 2024 and ongoing
	Establish a workgroup to develop a process to grow and maintain list, ensure it is used as part of recruitments, and track outcomes				

Promote WHS as a great place to work	Revise WHS employment internet page in an accessible manner to showcase the benefits to working for WHS	Revised page developed and implemented	Better understanding by potential hires from all backgrounds of why WHS would be a good choice	Jill Moksouphanh – Workforce and Culture Program Officer Laura Tetting – HR director	June 2024
	Create and provide promotional employment materials used by WHS programs when engaging with communities	Promotional material developed and process to ensure use		IT – TBD Program and Outreach - TBD	June 2024
Empower supervisors, HR, and interview/rating panelists with training and an awareness on recruitment and selection with DEIA lens and why it is important	Track *Recruitment Checklist with DEIA lens* usage, and make updates based on feedback	Annual survey - Year over year upward trend on if checklist is impacting recruiting/hiring decisions based on hiring supervisor feedback	Checklist used in 100% FTE recruitments	Laura Tetting – HR Jill Moksouphanh – Workforce and Culture Program Manger	June 2024 and ongoing
	Partner with DOA-BTD to develop on demand recruitment/hiring with DEI lens/unconscious bias training for HR, supervisors, new supervisors and staff serving on rating/interview panels	Agreement with BTD by June 2024, and if able, training created by Jan 2025 All current/new supervisors trained by June 2025	100% hiring managers 100% HR specialists 90% interview/rater panelists trained in recruitment/ hiring with DEI lens.	Laura Tetting – HR Jill Moksouphanh – Workforce and Culture Program Manger	Training start June 2025 and ongoing, pending BTD availability
Review LTE hiring process and provide direction to hiring supervisors on hiring through a DEI lens	Establish a workgroup involved in recruitments and at the direction of HR, to review current LTE hiring practices, cross reference with FTE recruitments, and leverage FTE processes where appropriate to strengthen diversity and inclusion when hiring LTEs -- Communicate to hiring managers and why it is important	Workgroup members attend training on equity and inclusion in hiring -- Committee will review and implement changes	100% workgroup members trained -- 100% of LTE recruitment and selection documents,	Laura Tetting – HR Workgroup of SMEs - TBD	September 2024 __ December 2025

	-- Finalize process flow in Asana		practices and processes will be reviewed with DEI lens and changes implemented as necessary		
Through community engagement, collecting, and collaboration, ensure inclusive and underrepresented stories are told, making WHS an attractive employer for individuals who see themselves in these stories	*Tracked in DMHS Strat. Plan* Track and launch design development community engagement integration into history center design; especially with Native Nation Council. -- Across DMHS, implement programs and experiences at the that reflect the diverse history of the state. -- Develop plan and implement opportunities to widen interpretation and reflect full history of the grounds as part of daily experience at all sites.	100% story displays referencing specific communities are engaged through consultation by 2025. -- Incorporated into annual planning with 10% growth annually. -- Diverse stories and perspectives part of central experiences at most locations by 2026.	Increased interest from individuals from all diverse backgrounds to engage with WHS, and consider applying for job openings	Nick Hoffman – DHMS Administrator Jill Sterrett, Collections Division Administrator	June 2024 and ongoing ---- June 2024 with continual enhancements ongoing. ---- Plan completed by May 2024. Implementation launched in FY25 with enhancements ongoing. Inclusive of all sites.
	Tracked in Programs Strat. Plan Correct/expand historical markers to include more underrepresented stories -- Implement programs that reflect Inclusive storytelling	Increase in number of historical markers covering under represented history -- Continual increase in number of Press books and magazine articles about underrepresented histories Continual increase in number of community	Increased interest from individuals from all diverse backgrounds to engage with WHS, and consider applying for job openings	Angela Titus – Assistant Deputy Director & Chief Program Officer	June 2024 and ongoing

		partners from communities of color/underrepresented groups			
	Build skills in our staff involved in collections and community engagement to feel confident in engaging with and doing histories of marginalized communities	Seek at least one DEIA training and development opportunity quarterly and promote to all staff, to include training focused on community engagement and collections - Year over year upward trend of training/development completed	Increased confidence and effectiveness of staff involved in this work	Nick Hoffman – DHMS Administrator; Jill Sterrett, Collections Division Administrator Angela Titus – Assistant Deputy Director & Chief Program Officer Laura Tetting – HR Director Jill Moksouphanh – Workforce and Culture	Jan 2024 and ongoing
	Strengthen relationships through Tribal Liaison and Tribal Nations Council		Increased interest from individuals from all diverse backgrounds to engage with WHS, and consider applying for job openings	Director's Office Rachel Byington – Tribal Liaison	
Strengthen relationships with community organizations, informal networks, local history affiliates, post-secondary education – a pipeline to both current and future talent pools	*Tracked in DMHS Strat. Plan* Launch a multi-year statewide teacher council to collaboratively develop educational experiences and resources connected to the WHS history center and sites (Aug. 2023)	Increase teacher database by 10% annually, especially from underserved areas. Ensure council members reflect the	Increased interest from individuals from all diverse backgrounds to engage with WHS, and consider applying for job openings	Nick Hoffman – DHMS Administrator	Integrate into annual planning for FY2025. Multi-year attendance and revenue growth

		diversity and identities of Wisconsin.			
	Create and provide promotional employment material and a process to connect with college career services and other student groups	Promotional material developed and process to ensure use	Increased interest from individuals from all diverse backgrounds to engage with WHS, and consider applying for job openings	Laura Tetting – HR Director Program area SMEs – TBD	January 2024

Retention Goal: *WHS will create an environment that fosters a diverse, inclusive, equitable, and engaging workplace where staff feel heard, valued, and empowered at all stages of the employee lifecycle.*					
Retention Strategies	**Actions**	**KPI**	**Outcome/Metric**	**Responsible staff/office**	**Targeted Completion Date**
Develop, implement, and communicate a comprehensive employee engagement strategy and corresponding action plan that is measurable and based on data. Employee engagement factors include leadership and internal communications; diversity, equity, inclusion, and accessibility (DEIA); health and wellness; training and development; recognition; and continuous improvement	*Tracked within DBS Strat. Plan* **Survey:** Administer, analyze, communicate employee engagement survey annually and create action plans based on findings, include additional questions related to DEIA	Annual Survey	75% survey participation	Jill Moksouphanh – Workforce and Culture Program Manager	Dec 2023 and ongoing
	Leadership/Internal Communication: *Implement revisions to the all-staff meetings - incorporate DEIA and division awareness into the monthly programming series, *Utilize other communication platforms weekly *Design and maintain internal employee engagement Inside web site to include resources on training/development, DEIA, Wellness, Continuous Improvement and Recognition	Year over year upward trend on engagement survey in factors of employee engagement including leadership and internal communication, recognition, training, and development	Engagement survey feedback and other feedback incorporated in EI /engagement planning annually to incrementally increase employee engagement and retention	Jill Moksouphanh – Workforce and Culture Program Manager Workgroups: TBD	March 2024 and ongoing

	*Refresh content on Intranet site to ensure it is up to date and easy to find *Continue and enhance listening sessions with the Director's Offices **Health, Wellness, and Connectedness**: *Form Wellness committee to partners with DOA to promote wellness events/communications *Create environmental changes to workspaces and common areas to promote social and inclusive interactions *Coordinate Partners in Giving Campaign, connecting staff to each other and to their communities, include staff located outside Dane Co. **Continuous Improvement**: Develop and deliver 5S Continuous Improvement training – empower staff to make efficiencies in their work processes **Recognition:** *Annual all staff recognition party *Develop and implement Public Service Appreciation Week Activities *Develop and Implement Length of Service Program *Consider a Summer Picnic, (so seasonal LTE staff are included), and/or other ways to include the site staff				

	Training and Development: ***Annual All Staff Conference to include professional development sessions Seek out and communicate training opportunities Review effectiveness of employee development program *Research Mentorship Program possibilities				
Strengthen onboarding and orientation processes	*Tracked in DBS Strat. Plan* Develop and launch new employee orientation and onboarding programing for all agency staff (FTE, LTE, Seasonal), and review to continuously improve	Increase in supervisor and leadership engagement in the onboarding program.	New employees encounter engaging, efficient and effective experience at the beginning of the employee lifecycle	Laura Tetting – HR WHS Supervisors Senior Leadership Team (SLT)	June 2024 and ongoing
Promote exit surveys to analyze trends in reasons for leaving, especially for underrepresented groups	*Tracked in DBS Strat. Plan* Promote the use of exit surveys and interviews to identify opportunities to improve retention and engagement. Give opportunity to provide demographic data on survey for tracking purposes	Year over year upward trend of completed exit surveys, 10% in 1st year	Exit survey feedback incorporated in EI /engagement planning annually	Laura Tetting – HR HR Team	July 2024 and ongoing

Agency Culture Goal: *WHS will promote an agency culture free of bias; a respectful culture that values diversity, promotes equity, actively engages inclusion, and ensures accessibility.*					
Agency Culture Strategies	**Actions**	**KPI**	**Outcome/Metric**	**Responsible staff/office**	**Targeted Completion Date**
Provide awareness to internal staff of the inclusive stories being, collected and told, and of the expanded community outreach that WHS is doing externally	Seek events and opportunities to communicate in various internal platforms (weekly wrap up, all staff town halls, Inside, printed materials, and other forms of communication)	Monthly communication	Increase awareness and pride WHS inclusion work in telling inclusive stories and community engagement and outreach	Jill Moksouphanh – Workforce and Culture Program Manager IDEA Team co-chairs IDEA Team members	January 2024 and ongoing

	Tracked in Programs Strat. Plan Create all staff Program/Outreach onboarding materials that communicates agency Program, Community Engagement, and Accessibility philosophies to new hires.	Training completed, reviewed and continuously updated		Angela Titus – Assistant Deputy Director & Chief Program Officer	January 2024 and ongoing
Empower and support the IDEA Team to act as an advocate and a resource for equity and inclusion in the agency and to promote DEIA awareness, training, programming, and events	Expand events/programming hosted by the IDEA Team focused on DEIA awareness, education, and information to all WHS staff	Annual workplan	At minimum, quarterly events/programming as established in the annual plan	IDEA Team co-chairs IDEA Team members/ subgroups Jill Moksouphanh – Workforce and Culture Program Manager Laura Tetting – HR Director (EI Officer)	Workplan March 2024 and annually Events/programming ongoing
	Develop a policy on and support Employee Resource Groups (ERGs), i.e., affinity groups, special interest resource group	Policy completion	Offer at minimum one ERG		ERG policy – July 2024 ERG formation – Dec 2024
	Research partnering with a vetted program or institution to offer support on how to measure, expand, and maintain diversity along with a supportive work environment	Present findings of research for partnerships to SLT	TBD based on SLT response		Findings presented March 2024
Communicate more broadly respectful workplace policies, and improve staff ability to report issues	Communicate/track the requirement to complete state required Respectful Workplace training	Increased participation in mandatory training by 10% first year and upward trend year over year	95% training completion rate annually	Laura Tetting – HR Jill Moksouphanh – Workforce and Culture Program Manager	January 2024 and ongoing
	Enhance internal webpage dedicated to equal opportunity, harassment, FMLA, Reasonable Accommodation polices/provide other forms of training/information	Website complete	Increased awareness, and self-service of information, resources, and forms	Laura Tetting – HR Jill Moksouphanh – Workforce and Culture Program Manager	Ongoing
Build awareness in DEIA and why it matters	Change management communication strategy for all staff and supervisors	Communication planning annually	100% implementation of communication plan	Jill Moksouphanh – Workforce and Culture Program Manager Laura Tetting – HR Director	January 2024 and ongoing

				IDEA Team chair members	
	Develop and implement WHS DEIA-employee engagement training focusing mainly on Workforce Culture section and IDEA team - as part of employee new hire orientation	Training developed	Training provided at 100% new hire (FTE, LTE) orientations	Jill Moksouphanh – Workforce and Culture Program Officer	Training developed March 2024 and training provided ongoing
	Identify and promote supervisory skills training prioritizing training in inclusivity practices, managing conflicts, and communicating agency priorities, to include topics related to DEIA	Seek at least 1 supervisory skills related training and development quarterly and promote to supervisors	Upward trend in supervisors trained that helps supervisor skillset, to include DEIA related issues	Laura Tetting – HR Director Jill Moksouphanh – Workforce and Culture Program Officer	Oct 2024 and ongoing
	Identify and promote DEIA related professional development and training and ensure a process in Cornerstone or other method to track and recognize attendance	Seek at least one DEI training and development opportunity quarterly and promote to all staff - Year over year upward trend of training/development completed	Upward trend in staff members with awareness and knowledge of DEIA related issues	IDEA Team co-chairs IDEA Team members/subgroup Jill Moksouphanh – Workforce and Culture Program Manager	Cornerstone and/or other method communicated and at least 1 DEI training promoted by March 2024, and ongoing
Associated Agency Culture Staff Training	• Promote the ***Diversity, Equity, Inclusion, and You 3 Part Series*** provided by DOA-BEI to all staff on a regular basis. This training is regularly offered through Cornerstone. Track participation – year over year increase • Expand Cornerstone training offerings to Foundation employees • Seek out, communicate, and promote DEIA training that all staff, including Foundation employees, students, and volunteers can participate in (e.g., UW Diversity Forum)				

Communication Plan

Internal Methods of Communication

- A memorandum detailing the location of the WHS Equity and Inclusion (EI) Plan and outlining the employee the responsibility to read, understand, support, and implement equal opportunity and the EI Plan will be sent from the WHS Leadership or alternatively, the Workforce and Culture Program Officer, to all staff on an annual basis. This responsibility extends to employees in every type of position, including unclassified, classified, project, limited-term, volunteers, interns, and work-study personnel, and to Wisconsin Historical Foundation employees where applicable.
- The WHS EI Plan is available to all employees on the WHS internal website at https://inside.wisconsinhistory.org/workforce-culture/, and https://inside.wisconsinhistory.org/doas/hr/.
- WHS will make the plan available in a print copy or alternative formats to anyone who requests it.
- WHS, including Foundation where applicable, commitment to the EI plan will be communicated in all staff emails and all staff meetings when published, annually, and periodically.
- WHS EI Plan and WHS, including Foundation where applicable, commitment to the plan will be reinforced with supervisors and managers when published, annually, and on a periodic basis.
- The WHS Equity and Inclusion Plan will be reviewed during new employee orientation sessions.
- Nondiscrimination and equal opportunity statements and posters are prominently displayed and available in areas frequented and accessible to employees.

External Methods of Communication

- The WHS Equity and Inclusion Plan will be available on the WHS public website at https://www.wisconsinhistory.org/, and/or on the WHS public website employment page at https://www.wisconsinhistory.org/Records/Article/CS15266
- A print copy or alternative formats will be made available to anyone who requests it.
- The WHS public website employment page and job postings, includes 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.
- A commitment to equal employment opportunity statement will be included in procurement contracts.

Communication Plan Oversight

The WHS Workforce and Culture Program Officer, or alternatively the HR Director (EI Officer), will ensure follow-through, oversight, and request feedback on all parts of the communication plan. They will:

- Ensure communication is an ongoing activity and will share the plan and successes, and request feedback with the entire agency and external stakeholders, at least quarterly.
- Schedule regular check-ins between the individual(s), subgroups, divisional leadership, and HR to monitor the plan's progress and communicate status and successes.
- Establish a tracking mechanism to document the communication plan to the agency.
- Request feedback on the resources and activities used to evaluate the implementation's effectiveness. Examples include new data-gathering tools or surveys, professional development, staffing changes that impact implementation, etc.
- Contact BEI for ongoing support, questions, and innovative next steps.

Implementation Plan and Agency Monitoring

This WHS Workforce and Culture Program Officer and the WHS HR Director (EI Officer), depending on function, or designee, will provide oversight, monitor, track, and evaluate the implementation of the WHS Equity and Inclusion Plan. Responsibilities will include, but are not limited to:

EI Officer or designee

- Monitor 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 on an ongoing basis.
- Monitor imbalances in the workforce with respect to minorities, women, veterans, and individuals with disabilities on an ongoing basis.
- Track and review discrimination and harassment complaints, including trends, circumstances, decrease/increase, and resolutions on an ongoing basis.
- Track and review retention issues, i.e., upward mobility for underrepresented group members on an ongoing basis.
- Review the progress made to ensure access for individuals with disabilities on an ongoing basis.
- Review workforce data and reports with all levels of management, at least annually.

Workforce and Culture Program Officer or designee

- Meet with IDEA Team and/or designated subgroups to strategically implement and measure actions items as outlined on the Work Plan, at least monthly. This includes a process to: define goals, conduct research, map out risks, schedule milestones, assign tasks, and allocate resources.
- Require internal reporting by organizational units to assess how much plan objectives are being met and communicate these updates with WHS workforce, at least quarterly.
- Advise agency leadership of plan effectiveness and make recommendations to modify and/or improve performance where necessary on a bi-annual basis.
- Review the new employee and hiring manager's participation in equity and inclusion training on an ongoing basis.

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 (and Foundation) 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.
- 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.

Name of individual(s) responsible Name:

Christian W. Øverland **Title:** The Ruth and Hartley Barker Director & CEO

Email: christian.overland@wisconsinhistory.org **Phone:** 608-264-6440

Workforce Culture Program Officer and Equity and Inclusion Officer

As delegated, the Workforce and Culture Program Officer and the HR Director (EI Officer), or designee are directly responsible for developing, coordinating, and implementing the agency's EI plan. The Workforce and Culture Program Officer and/or 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.
- Reports quarterly to the agency head/director on the progress including metrics of the equity and inclusion plan.
- 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.
- Coordinates and monitors the agency's FMLA and reasonable accommodation requirements to ensure compliance with the Americans with Disabilities Act (ADA).
- Manages the agency's Respectful Workplace requirements to ensure compliance with Harassment and Discrimination laws.
- Attends at least 12 hours of equity and inclusion training annually.
- Attends equity and inclusion and agency supervisory training.
- Establishes a plan for regular communication regarding the EI plan process, activities, and outcomes to build transparency, broad participation, and support.
- Participates in and advises the agency's Equity and Inclusion Committee (IDEA Team) as a non-voting member.

Name of individual(s) responsible

Name: Laura Tetting **Title:** HR Director (EI Officer)

Email: laura.tetting@wisconsinhistory.org **Phone:** 608-264-6448

Name: Jill Moksouphanh **Title:** Workforce and Culture Program Officer

Email: jill.moksouphanh@wisconsinhistory.org **Phone:** 608-265-3882

HR Director

The HR Director is 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 Workforce and Culture Program Officer.
- 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 Workforce Culture Program Officer to develop and execute the EI plan.
- Provides the Workforce Culture Program Officer with the support and data necessary to perform duties and responsibilities related to equity and inclusion.

Name of HR Manager

Name: Laura Tetting **Title:** HR Director

Email: laura.tetting@wisconsinhistory.org **Phone:** 608-264-6448

Equity and Inclusion Planning, Development, and Implementation Team
The EI Planning, Development and Implementation team is a representative group of agency employees selected by the appointing authority to assist with the planning, development, and implementation efforts for the equity and inclusion plan. For WHS, the EI Planning, Development, and Implementation team and IDEA Team are one. The EI Planning, Development, and Implementation 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.
- Assists with developing, rolling out, implementation, and monitoring of the agency's EI Plan.
- Assists with 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:

- Emmy Keller – IT Project Manager
- Sarah Taylor – Assistant Collections Manager
- Michelle Kamke – Communications Coordinator
- Laurel Miller – Manager of PK-12 Museum Education – Wisconsin Historical Museum
- Jenna Loda Eddy – Box Office Manager
- Kate Melberg – Youth Experience Coordinator – Wisconsin Historical Museum
- Benjamin Lillge - Circulation Assistant
- Abigail Behrends – Microfilms Archivist
- Amy Wyatt – Deputy State Historic Preservation Officer
- Elizabeth Hilton – National Register Coordinator
- Laura Tetting – HR Director
- Jill Moksouphanh – Workforce and Culture Program Manager
- Jennifer Roades - Executive Staff Assistant
- Maria Parrott-Ryan - Press Senior Editor of K-12 Publications