

# State of Wisconsin Board on Aging and Long Term Care Equity and Inclusion Plan

January 1, 2024 – December 31,  
2026



## Table of Contents

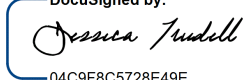
<b>I.</b>	<b>Acknowledgments.....</b>	<b>3</b>
<b>II.</b>	<b>Agency Statement of Commitment.....</b>	<b>4</b>
<b>III.</b>	<b>Individuals Responsible for Directing and Implementing the Equity and Inclusion Plan.....</b>	<b>5</b>
<b>IV.</b>	<b>Introduction (Alignment with Vision, Mission, and Values).....</b>	<b>9</b>
<b>V.</b>	<b>Workforce Analysis Summary .....</b>	<b>11</b>
<b>VI.</b>	<b>Agency Goals, Strategies, Metrics to Advance Equity and Inclusion.....</b>	<b>17</b>
<b>VII.</b>	<b>Internal and External Communication of Equity and Inclusion Plan.....</b>	<b>22</b>
<b>VIII.</b>	<b>Agency Monitoring and Implementation Plan.....</b>	<b>25</b>

## Acknowledgment

We have reviewed and firmly endorse 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, this Equity and Inclusion Plan enables progress and results to be measured agency wide.

### Appointing Authority:

Jessica Trudell  
Executive Director  
Jessica.trudell@wisconsin.gov

DocuSigned by:  
  
Signature: [04C9F8C5728E49E...]  
Date: 12/14/2023 | 8:23 AM CST

### Equity and Inclusion Professional:

Kristen Johnson  
Counsel to the Board  
Kristenk.johnson@wisconsin.gov

DocuSigned by:  
  
Signature: [CFAC4CED04B94BE...]  
Date: 12/14/2023 | 8:28 AM CST

**Date of submission to DPM/BEI:** December 15, 2023

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

### Implementation Team Members:

Jessica Trudell, Kristen Johnson, Amy Zabransky, Mary LeMay, Vi Quang, Mary Mckeown, Gina Singletery, Karee Slaminski, Kayla Smith, Nicklaus Lutes

### Contributors and other subject matter experts consulted:

Bureau of Equity and Inclusion (BEI)  
Nick Wittwer, Equity and Inclusion Specialist, DOA  
Dr. Alonzo Kelly  
Jennifer Dargan (ECB)  
Kristina Thole (OCI)

## Board on Aging and Long Term Care Equity and Inclusion Commitment Letter

The Board on Aging and Long Term Care (BOALTC) 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.

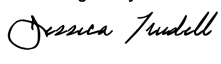
Our agency is firmly committed to complying with the state laws and policies and federal laws for equal employment opportunity and affirmative action. BOALTC recognizes that equal employment opportunity is a legal, organizational, and economic necessity to ensure equity and diversity of the state's workforce. 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.

As part of our agency's commitment to this overall process, we intend to ensure equal opportunity and freedom from discrimination in all employment policies, procedures, and programs, including recruitment, selection, job assignment, training, compensation, benefits, discipline, promotion, transfer, layoff, and termination processes. Employees and applicants with disabilities will receive reasonable accommodations.

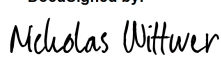
BOALTC has developed and committed to maintaining a written Equity and Inclusion Plan. This Equity and Inclusion Plan has my total support, and BOALTC pledges its best good faith efforts to achieve the goals identified in this Equity and Inclusion Plan. I expect each manager, supervisor, and employee of the agency to aid in the implementation of the goals identified in this plan and be accountable for complying with its objectives. BOALTC will maintain a monitoring and reporting system to ensure compliance with the Equity and Inclusion mandates. The plan is available for review on the agency's website or at the agency's headquarters in Madison.

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:  
Jessica Trudell  
Executive Director

DocuSigned by:  
  
Signature: 04C9F8C5728E49E...  
Date: 12/14/2023 | 8:23 AM CST

DPM Equity and Inclusion Officer Name:  
Nicholas Wittwer  
Equity and Inclusion Specialist

DocuSigned by:  
  
Signature: EE660ECD453E415...  
Date: 12/14/2023 | 9:02 AM CST

## **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 DOA Equity and Inclusion Advisory Committee and BOALTC EI Workgroup on agency EI programs, initiatives, and policies.

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

**Name:** Jessica L. Trudell

**Title:** Executive Director

**Email:** Jessica.trudell@wisconsin.gov

**Phone:** 800-815-0015

### **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:** Nicholas Wittwer

**Title:** Equity and Inclusion Specialist, DOA

**Email:** nicholas.wittwer1@wisconsin.gov

**Phone:** (608) 267-1015

**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:** Kristen K. Johnson

**Title:** Counsel to the Board

**Email:** kristenk.johnson@wisconsin.gov

**Phone:** 800-815-0015

**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:** Jen Flogel

**Title:** Chief HR Executive

**Email:** jen.flogel1@wisconsin.gov

**Phone:** 608 266-5829

**Name of HR Manager**

**Name:** Jesus Villa

**Title:** Assistant Administrator

**Email:** jesusj.villa@wisconsin.gov

**Phone:** 608 261-6057

**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:**

Membership:

Kristen Johnson, Chair  
Mary LeMay, Member  
Amy Zabransky, Member  
Vi Quang, Member  
Mary Mckeown, Member  
Kayla Smith, Member  
Karee Slaminski, Member  
Gina Singletery, Member  
Nicklaus Lutes, Member

Roles and Responsibilities:

Workgroup

- Work collaboratively to make recommendations and suggestions to agency leadership related to EI initiatives. If an agreement cannot be reached, the decision of a majority of members will prevail.

Workgroup Chair

1. Facilitate the meetings and set the agenda.
2. Ensure meetings are productive and within scope.
3. Update the work group on information from DOA/BEI.

Workgroup Members

- Attend and contribute to team meetings.
- Actively participate by taking on special assignments as needed.
- Maintain confidentiality when appropriate.
- Gather related information/feedback outside of meetings.
- Participate in the presentation of recommendations to BOALTC leadership.



## **Board on Aging and Long Term Care Introduction**

In response to Governor Evers' Executive Order #59, Relating to Diversity, Equity, and Inclusion in State Government, as an attached Board, the Board on Aging and Long Term Care (BOALTC) has worked with the Department of Administration (DOA) to recommend goals, strategies, and initiatives that reaffirm BOALTC's commitment to supporting and sustaining a diverse and inclusive workplace environment and community.

Our mission is to advocate for the interests of the state's long-term care consumers, to inform consumers of their rights, and to educate the public at large about health care systems and long-term care. As an agency that provides advocacy, education, and resources, we are on the forefront of helping to change and address injustices for the populations of consumers we serve. The Long Term Care Ombudsman Program serves around 120,500 long-term care residents and consumers age 65 and older. Our Medigap Helpline Program serves Wisconsin's nearly 1.2 million Medicare beneficiaries, which also includes those under 65 enrolled due to disability. We are dedicated and committed to consumer-focused advocacy and education. Our values include respect and dignity, protection of rights, quality of life, fairness, transparency, and clear communication. Our mission and values as an agency align with the expectations of Executive Order #59. We are committed to creating real and lasting change.

These recommendations were formalized into the following BOALTC Equity and Inclusion Plan, which serves as a platform in which the agency will continue to build a culture that reflects equity and inclusion within our workforce and those we serve, and affirms our commitment to transforming the policies, structures, and practices to support those principles.

The plan was written and created by the staff of BOALTC with support from DOA HR and other stakeholders. As an attached Board with, to date, 46 FTE, 1 LTE, and 1 Project Position, we rely on DOA HR to provide support and guidance. In preparation for this plan, BOALTC staff attended trainings that were provided by BEI on creating and writing a plan and followed those standards in writing the plan for the agency. The team that worked on the plan reviewed the data of the agency to understand what areas we could focus on to improve. The team reviewed qualitative and quantitative data to identify areas of focus or barriers identifiable related to recruitment, retention, and agency culture.

The three overarching goals are identified in this plan are:

1. Increase recruitment in underutilized populations to diversify agency staff and expand advocacy efforts in line with the agency mission.
2. Encourage retention of current and incoming agency staff to minimize the impact to program operations caused by retirements and staff departures.
3. Foster a work environment that promotes and encourages self-care, flexibility, and overall employee satisfaction.

Within each of these goals, BOALTC has defined a series of strategies and actions that will be taken over the next couple of years. To support these efforts, the plan identifies responsibility and describes performance metrics that will be monitored to ensure progress is realized. BOALTC works collaboratively and receives Human Resource support from the Department of Administration, Division of Personnel Management, Region 1 Human

Resources Shared Services, DOA HR. DOA HR provides services to BOALTC and supports the employees in all aspects of Human Resources including but not limited to: recruitment, performance management, payroll and benefits, employment relations, and FMLA and reasonable accommodations.

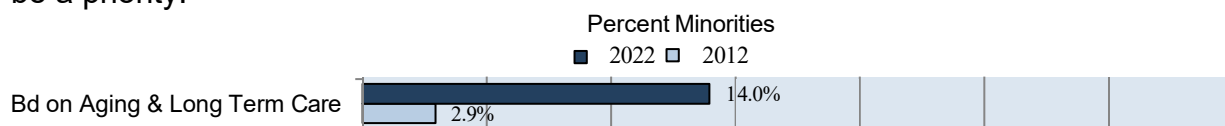
## Board on Aging and Long Term Care Workforce Analysis Summary

As part of the workforce analysis process, BOALTC reviewed the following data:

- State of Wisconsin Classified Workforce & Affirmative Action Report (Fiscal Years 2021 and 2022)
- State of Wisconsin Workforce Analysis – Demographic Summary (End of CY2023 Q1)
- Board on Aging and Long Term Care Workforce Analysis – Demographic Summary (End of CY2023 Q1)

### Racial and Ethnic Minorities

Data was provided to BOALTC by DOA in the State of Wisconsin Workforce & Affirmative Action Report related to the percentage of racial and ethnic minorities within the Wisconsin labor force compared to the percentage of racial and ethnic minority employees in permanent classified positions in state agencies with at least 10 employees. This data was collected from PeopleSoft in 2022 and PMIS in 2012. This data shows that in 2022, 14.0% of BOALTC employees identify as a racial or ethnic minority. This is an 11.1% increase from 2012, when 2.9% of BOALTC employees identified as a racial or ethnic minority. However, the data shows the percentage of racial and ethnic minority employees employed by BOALTC is slightly below the percentage of racial and ethnic minorities within the Wisconsin labor force, which was 15.3% in 2022. This data shows that racial and ethnic minority representation within BOALTC is increasing but is still not reflective of the percentage of racial and ethnic minority employees within the available workforce. Increased representation of racial and ethnic minorities within the agency will continue to be a priority.



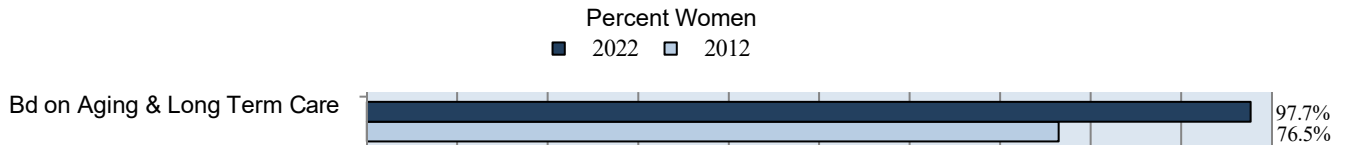
Data provided by Human Resources indicates that from January 1, 2021, to June 30, 2023, BOALTC recruited for 17 positions. Applicant data from those recruitments indicates that 16.67% of the applicants identified as a racial or ethnic minority, two or more races, or unknown. Of the applicants hired for those positions, 12% identified as a racial or ethnic minority, two or more races, or unknown. Additional analysis of this data shows that some individuals applied for multiple positions within the agency, which may impact the interpretation of the data. This shows further analysis is required to determine if any barriers exist for racial and ethnic minorities when applying for vacancies within the agency, and where in the recruitment and hiring process those barriers might exist.

### Women

The Department of Workforce Development estimates that women compose 48.1% of the civilian labor force employed in Wisconsin. Data was provided to BOALTC by DOA in the State of Wisconsin Workforce & Affirmative Action Report related to the percentage of women employed in permanent classified positions in agencies with at least 10 employees. This data was collected from PeopleSoft in 2022 and PMIS in 2012. This

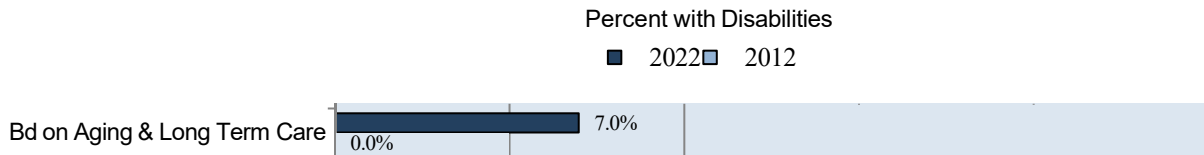
data shows that BOALTC significantly exceeds the percentage of women employed in the general civilian labor force by 49.6%, with women making up 97.7% of BOALTC staff in 2022.

Although BOALTC remains strong in female representation, the overwhelming percentage of women employees shows that male employees are underrepresented within the agency and that increased representation of males is needed in order to more accurately reflect the number of male employees within the Wisconsin civilian labor force.



**Persons with Disabilities**

The Department of Workforce Development estimates that persons with disabilities compose 5.2% of the civilian labor force employed in Wisconsin. Data was provided to BOALTC by DOA in the State of Wisconsin Workforce & Affirmative Action Report related to the percentage of persons with disabilities employed in permanent classified positions in agencies with at least 10 employees. This data was collected from PeopleSoft in 2022 and PMIS in 2012. This data shows that BOALTC exceeds the percentage of persons with disabilities employed in the general civilian labor force by 1.8%, with persons with disabilities making up 7.0% of BOALTC staff in 2022. This is a significant increase from 2012, when 0.0% of BOALTC employees identified as persons with a disability. This data shows that the representation of individuals with disabilities within BOALTC is increasing and is becoming reflective of the percentage of individuals with disabilities within the available civilian workforce.



**Veterans**

The State of Wisconsin Workforce Analysis Demographic Summary (End of CY2023 Q1) indicates that 9.0% of BOALTC employees identify as Veteran Status, with 91.0% identifying as Not a Veteran or Not Indicated. Recruitment and retention of Veteran employees will continue to be a priority for BOALTC. Data regarding the number of veterans in the Wisconsin civilian labor force was not provided and accurate data was not easily located.

VETERAN STATUS - BOALTC				
Veteran Status**	# of Employees*	% of Employees*	Sum of FTE	% of FTE
Veteran	4	8.9%	4	9.0%
Not a Veteran/Not indicated	41	91.1%	41	91.0%
<b>Grand Total</b>	<b>45</b>	<b>100.0%</b>	<b>45</b>	<b>100.0%</b>

## Eligibility for Retirement

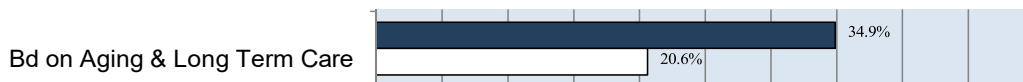
Data was provided to BOALTC by DOA in the State of Wisconsin Workforce & Affirmative Action Report related to the percentage of permanent classified employees eligible for normal retirement within five (5) years. This data was collected from PeopleSoft in 2022 and PMIS in 2012. The data shows that in 2022, 34.9% of all permanent classified employees at BOALTC were eligible for normal retirement within 5 years. This data also shows that the percentage of BOALTC employees eligible for normal retirement within 5 years has increased by 14.3% since 2012. Further, the chart below shows that as of June 2022, about 14% of BOALTC employees were immediately eligible for retirement and just over 50% of employees will be eligible for retirement within 10 years.

This data will be extremely significant for BOALTC in the coming years. Over 50% of current BOALTC staff is or will be eligible for retirement within the next 10 years. The agency expects to lose numerous employees in leadership positions with extensive knowledge and experience. We will strive to make recruitment of diverse candidates a priority to broaden the knowledge and experience within the agency. Through internal and external discussions, it has been determined that BOALTC could benefit from increased community outreach and agency visibility to recruit potential employees and increase community outreach and advance advocacy efforts in underserved populations.

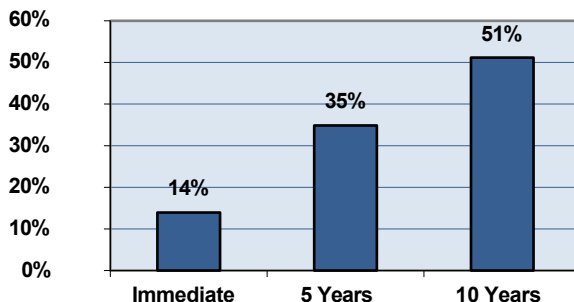
Not only will our agency need to focus on recruiting for the vacant positions caused by expected retirements, but it will be equally important that we retain our current staff. Retention and agency culture will be a primary focus of our agency to ensure the institutional knowledge of current employees remains within the agency. Additionally, a focus on professional development and leadership skills amongst current employees will be important to give staff the opportunity to fill vacant leadership positions caused by employee retirements.

Percentage of Permanent Classified Employees Eligible for Normal Retirement Within Five (5) Years

■ 2022 □ 2012



BOALTC Eligibility for Normal Retirement as of June 2022



Agency	Count of Employees in Agency	Eligible for Normal Retirement Now		Eligible for Normal Retirement within 5 Years		Eligible for Normal Retirement within 10 Years	
		#	%	#	%	#	%
BOALTC	43	6	14%	15	35%	22	51%
<b>All Agencies</b>	<b>27,467</b>	<b>1,903</b>	<b>6.9%</b>	<b>5,700</b>	<b>20.8%</b>	<b>10,004</b>	<b>36.4%</b>

### Separations from State Service

Data was provided to BOALTC by DOA in the State of Wisconsin Workforce & Affirmative Action Report related to the percentage of permanent classified employees eligible that separated from State Service in Fiscal Year 2021 and Fiscal Year 2022. This data shows that in FY2021, 4.8% of employees (2 employees) voluntarily left BOALTC, 7.1% of employees (3 employees) retired, and no employees involuntarily separated from the agency. In FY2022, 7.0% of employees (3 employees) voluntarily left BOALTC, 2.3% of employees (1 employee) retired, and 2.3% of employees (1 employee) involuntarily separated from BOALTC due to the passing of the employee. This data shows that in total, 5 employees left employment at BOALTC in both FY2021 and FY2022.

BOALTC strives to develop and maintain a positive agency culture, mindful of equity and inclusion principles and focused on satisfaction of all employees. The work of the agency tends to take an emotional toll on employees, potentially creating burnout, compassion fatigue and/or secondary trauma, making it critical for the agency to promote self-care and a healthy work-life balance. The previous employee satisfaction survey and ongoing discussions with staff have shown that employees value flexibility, remote work, and self-care initiatives. By focusing on these cultural aspects within the agency, BOALTC hopes to maintain employee satisfaction to ensure our clients are receiving zealous advocacy services. BOALTC will continue to focus on retention and agency culture, in general and as identified specifically in this plan.

### Separations from State Service – Permanent Classified Employees

	Voluntary Separations		Involuntary Separations		Retirements		Total – All Separations	
	#	%	#	%	#	%	#	%
<b>Fiscal Year 2021</b>	2	4.8%	0	0.0%	3	7.1%	5	11.9%
<b>Fiscal Year 2022</b>	3	7.0%	1	2.3%	1	2.3%	5	11.6%

## Information from BOALTC Employees

### Staff Survey Results:

In 2021, BOALTC's Equity and Inclusion Workgroup developed and implemented an employee survey to get direct feedback from employees. The survey results show that overall, most employees are satisfied with the performance of agency leadership, their supervisor, and their team/coworkers. The survey showed most employees are not interested in a mentorship program within the agency. In order, employees indicated they would be interested in additional training in the areas of professional development, understanding budgets and funding sources, job specific training, and diversity training. Several employees said that staff salaries are not commensurate with responsibilities and job duties.

Suggestions from the survey included:

- Request for more communication with and education about other state agencies. Often, the clients BOALTC serves interact with more than one state agency at the same time. To provide accurate information, it would be helpful for BOALTC staff to know what other agencies do to coordinate services and best serve the clients.
- Internal preparation for the aging staff and upcoming retirements.
- A desire for increased flexibility and remote work. Responses indicated that remote work increases productivity and happiness and decreases stress levels.

Several of the comments received were positive, such as:

- Feelings that the agency is understanding, flexible, compassionate, and caring.
- Statements that the agency is the most supportive, encouraging, and considerate work environment an employee has ever worked for.
- Expressions of gratitude for supervisors, coworkers, and the overall work environment.

### Feedback from Equity and Inclusion Workgroup:

Over the past year, the Equity and Inclusion Workgroup has been meeting regularly, typically biweekly, to develop this plan and discuss agency goals and strategies. The Workgroup consists of employees from all three programs within the agency – the Ombudsman Program, Volunteer Ombudsman Program, and Medigap Helpline. Agency administration intentionally recruited employees from each program to get input and feedback from all programs to ensure the contents of this plan were representative of the entire agency. During these meetings, members discussed reasons why they accepted the position at BOALTC, why they stay working at the agency, possible areas of opportunity that would lead to them staying at the agency in the future and identified potential barriers to recruitment and accurate representation of diversity within the agency. Some key takeaways from those meetings are:

- Some employees had previous knowledge of the agency or spoke with people who worked at the agency. BOALTC has a good reputation for being an agency with employees dedicated to serving the mission, good teamwork, and overall employee satisfaction.

- Although BOALTC has a positive reputation, the agency lacks community visibility. Outside the long-term care community, it seems many people are unaware what BOALTC is and what services the agency provides. The Workgroup identified this as a potential barrier to recruitment.
- Employees in the Workgroup indicated they enjoy working at BOALTC because of the supportive work environment, flexibility, and because they believe in the mission of the agency to advocate for long-term care residents.
- Some employees expressed that they do not interact much with employees from other programs within the agency and said they would like to learn more about those programs and their services.
- Some employees indicated they feel BOALTC is removed from other state agencies and expressed a desire to learn more about what other state agencies do, specifically as it relates to interaction with the agency or employees. Examples given were budget/fiscal, human resources, benefits, and payroll, etc. Employees indicated that being more aware of what agencies do and how they interact would help them feel more connected and committed to being a state employee.
- Employees indicated they value flexibility, remote work options, and self-care from an employer. These areas were identified by the Workgroup as areas to focus on to maintain/improve agency culture.

#### Other Information:

#### Remote Work and Flexibility:

Agency administration and supervisors have become aware of an increased desire for remote work and flexibility, both among current staff and applicants for vacant positions. During recruitment for one position, at least one applicant indicated they could not accept the position if it was not fully remote or home officed. The Medigap Helpline Program does have requirements that employees work at headquarters a certain number of days per week due to the operational needs of the program and agency. On the other hand, the Ombudsman Program and Volunteer Ombudsman Program staff are assigned to serve clients who reside in specific regions throughout the state, so those employees are primarily assigned to a home office. Recently, vacant positions within the Medigap Helpline have been challenging to fill and have had to be reposted. With these recruitment challenges, the agency has been focusing on ways to make vacant positions more desirable for potential applicants. Considering the feedback from potential applicants and current employees, agency administration has identified remote work and flexibility as one of the potential areas for improvement within agency culture.

#### Size of Agency:

It is worth noting that BOALTC is a small agency with less than 50 employees. Therefore, when reviewing and analyzing data, the slightest change in employee demographic will have a significant impact on the data. For example, if one employee who identifies as Veteran Status within the agency retires, the numbers will reflect a significant decrease in veteran representation. Due to agency size, analyzing qualitative data needs to be a priority in determining equity and inclusion goals, strategies, and actions.



**Equity and Inclusion Strategic Plan  
Board on Aging and Long Term Care  
Goals and Strategies**

<b>Overarching Goals for EI</b>	<b>Strategies to Achieve Goals</b>
<p><b>Recruitment Goal</b></p> <p><b>Increase recruitment in underutilized populations to diversify agency staff and expand advocacy efforts in line with the agency mission.</b></p>	<ul style="list-style-type: none"> <li>• Gather and analyze applicant data to identify potential barriers for underutilized populations.</li> <li>• Increase engagement between BOALTC and underrepresented community organizations/groups.</li> <li>• Identify opportunities available to best utilize the State of Wisconsin Student Diversity Internship Program (SWSDIP).</li> <li>• Build capacity within agency to raise community awareness and visibility of agency and its mission.</li> </ul>
<p><b>Retention Goal</b></p> <p><b>Encourage retention of current and incoming agency staff to minimize the impact to program operations caused by retirements and staff departures.</b></p>	<ul style="list-style-type: none"> <li>• Provide opportunities to all employees for professional development, with a focus on leadership skills.</li> <li>• Promote communication and networking amongst staff to best utilize agency-wide knowledge, expertise, and experience.</li> <li>• Provide training/presentations from other state agencies to educate staff on statewide areas of concern.</li> </ul>
<p><b>Agency Culture</b></p> <p><b>Foster a work environment that promotes and encourages self-care, flexibility, and overall employee satisfaction.</b></p>	<ul style="list-style-type: none"> <li>• Address issues raised in previous staff satisfaction survey.</li> <li>• Obtain ongoing feedback from staff related to employee satisfaction to identify and address current concerns.</li> <li>• Encourage self-care initiatives and flexibility uniformly within the agency.</li> </ul>

## Equity and Inclusion Strategic Plan – Workplan

**Recruitment Goal: Increase recruitment in underutilized populations to diversify agency staff and expand advocacy efforts in line with the agency mission.**

Over 50% of current BOALTC staff is or will be eligible for retirement within the next ten years. The agency expects to lose numerous employees in leadership positions with extensive knowledge and experience. With this in mind, BOALTC is focused on increasing and improving recruitment efforts to fill the upcoming expected vacancies. Through internal and external discussions, it has been determined that BOALTC could benefit from increased community outreach and agency visibility in order to recruit potential employees as well as increase community outreach and advance advocacy efforts in underserved populations.

<b>Recruitment Strategies</b>	<b>Actions</b>	<b>KPI</b>	<b>Outcome/Metric</b>	<b>Responsible staff/office</b>	<b>Targeted Completion Date</b>
Gather and analyze applicant data to identify potential barriers for underutilized populations.	Working with Human Resources, track, review and analyze applicant demographic data, developing and implementing policy changes or additional training if found necessary to address any barriers identified.	Develop plan for tracking and analyzing data in Years 1 and 2; Develop any necessary process changes or additional training in Year 3.	Have reliable data to compare applicant demographic data to data of applicants selected for hire and identify opportunities for improvement.	Equity and Inclusion Professional HR Manager Executive Director	Ongoing
Increase engagement between BOALTC and underrepresented community organizations/groups.	Establish two strategic community partnerships with diverse community groups.	Research and conduct outreach to available community groups in Year 1; Establish and conduct meetings with identified community groups in Years 2 and 3.	Successful establishment of partnerships with two community groups based on available resources from BOALTC and community groups.	Equity and Inclusion Workgroup Equity and Inclusion Professional	Ongoing
Identify opportunities available to best utilize the State of Wisconsin Student Diversity Internship Program (SWSDIP).	Meet with BEI staff to discuss opportunities and develop agency strategy for engagement with SWSDIP.	Identify areas of opportunity in Year 1; BOALTC engagement with SWSDIP in Years 2 and 3.	Active engagement between BOALTC and SWSDIP based on available resources.	Equity and Inclusion Professional	Ongoing
Raise community awareness and visibility of agency and its mission.	Build capacity within agency by requesting additional positions, including Communications Specialist to manage external messaging and increase awareness within community.	Submit request for positions in the next budget cycle.	Request is approved by Governor and Legislature and position(s) is/are established.	Executive Director	December 2025

	<p>Increase community outreach efforts, specifically within diverse and/or underrepresented communities.</p> <p>Develop educational materials in plain language related to services available to residents from the Ombudsman Program, Volunteer Ombudsman Program, and Medigap Program.</p>	<p>Attend at least one event annually in diverse or underrepresented communities.</p> <p>Assign staff and establish plan in Year 1, develop and publish material in Years 2 and 3</p>	<p>Increase community awareness of BOALTC programs.</p> <p>Develop and publish material for use.</p>	<p>Program Supervisors/Leads All Staff</p> <p>Program Supervisors Ombudsman Program Staff Volunteer Ombudsman Program Staff Medigap Program Staff</p>	<p>Ongoing</p> <p>July 2026</p>
--	--	---	--	---	---------------------------------

<p><b>Associated Recruitment Staff Training</b></p>	<ul style="list-style-type: none"> <li>• The EI Officer will train Supervisors to review job postings and interview questions through an equity lens.</li> <li>• Cornerstone Training for Management Team and Supervisors conducting recruitment:             <ul style="list-style-type: none"> <li>○ Make Your Job Postings Inclusive</li> <li>○ Adding Value Through Diversity</li> </ul> </li> <li>• Cornerstone Training for all staff:             <ul style="list-style-type: none"> <li>○ Building Inclusive Work Communities</li> </ul> </li> </ul>
---	--

**Retention Goal: Encourage retention of current and incoming agency staff to minimize the impact to program operations caused by retirements and staff departures.**

Because BOALTC is expected to lose a significant number of staff over the next five years, employee retention is a priority. It takes up to two years for new employees to complete training and successfully perform all job responsibilities independently. During the transition period, current staff will be relied upon to maintain effective program operations. Current BOALTC leadership will need to share their knowledge and expertise with their staff to prepare the agency for these expected vacancies.

<b>Retention Strategies</b>	<b>Actions</b>	<b>KPI</b>	<b>Outcome/Metric</b>	<b>Responsible staff/office</b>	<b>Targeted Completion Date</b>
Provide opportunities to all employees for professional development, with a focus on leadership skills.	Offer strengths survey to employees to maximize individual job performance and inform management interactions with individual employees.	% of staff completing strengths survey	80% of staff will complete the survey.	Equity and Inclusion Workgroup Equity and Inclusion Professional	January 2025
	Highlight available trainings for staff specifically related to leadership skills and professional development.	N/A	Send out quarterly emails with training opportunities to staff with emphasis on leadership training.	Management Team Supervisors/Leads	Ongoing
Promote communication and networking amongst staff to best utilize agency-wide knowledge, expertise, and experience.	Develop and maintain information related to staff's professional experience and relevant interests/skills to be shared within the agency.	Gather information in Year 1; Maintain information for incoming staff ongoing.	Spreadsheet/document is established and maintained when employee directory is updated.	Management Team Officer Manager	Ongoing
	Provide management team with strategic planning training and work with each program to develop a succession plan for the next five years.	Provide training in Year 1; Develop succession plan in Years 2 and 3.	Development of sustainable succession plans for each program and progress reported at Management Team meetings.	Management Team Leads	September 2026
Provide training/presentations from other state agencies to educate staff on statewide areas of concern.	Request training/presentations from state agencies with pertinent information to be offered to staff.	N/A	A relevant presentation/training will be offered once per year.	Executive Director Equity and Inclusion Professional Equity and Inclusion Workgroup	Ongoing

<b>Associated Retention Staff Training</b>	<ul style="list-style-type: none"> <li>• All staff in-service:                             <ul style="list-style-type: none"> <li>○ Provide opportunity for each program to educate and update the agency on their specific program</li> <li>○ Work with outside agencies (ETF, DOA/HR, Wellness, Budget, Class/Comp, BTD, Legislative Council, DET, etc.) to provide training to all staff specific to that agency and their role</li> </ul> </li> </ul>
--	---

**Agency Culture Goal: Foster a work environment that promotes and encourages self-care, flexibility, and overall employee satisfaction.**

BOALTC strives to develop and maintain a positive agency culture, mindful of equity and inclusion principles and focused on satisfaction of all employees. The work of the agency tends to take an emotional toll on employees potentially creating burnout, compassion fatigue and/or secondary trauma, making it critical for the agency to promote self-care and a healthy work-life balance. The previous employee satisfaction survey and ongoing discussions with staff have shown that employees value flexibility, remote work, and self-care initiatives. By focusing on these cultural aspects within the agency, BOALTC hopes to maintain employee satisfaction to ensure our clients are receiving zealous advocacy services.

<b>EI Culture Strategies</b>	<b>Actions</b>	<b>KPI</b>	<b>Outcome/Metric</b>	<b>Responsible staff/office</b>	<b>Targeted Completion Date</b>
Address issues raised in previous staff satisfaction survey.	Review survey responses and discuss potential opportunities for improvement with management team.	N/A	Each program identifies areas for improvement implements a change to program operations to address specific issue.	Management Team Equity and Inclusion Professional	December 2025
Obtain ongoing feedback from staff related to employee satisfaction to identify and address current concerns.	Develop combined annual staff satisfaction and/or "stay" survey.	% of staff completing survey	80% of staff to complete survey annually.	Equity and Inclusion Workgroup Equity and Inclusion Professional	Ongoing
Encourage self-care initiatives and flexibility uniformly within the agency.	Review current policies and determine if new policy is appropriate to promote self-care and flexibility within agency programs.  Management prioritizes self-care and flexibility in each program, with open communication amongst programs.	Review current policies and discuss with management team in Year 1-2; Develop any new policy in Year 3  N/A	100% of relevant policies reviewed and new policy developed if determined necessary.  Ongoing discussions at monthly Management Team meetings related to self-care and flexibility.	Management Team  Executive Director Management Team/Supervisors	December 2025  Ongoing

<b>Associated Culture Staff Training</b>	<ul style="list-style-type: none"> <li>• Offer self-care and wellness-related trainings to staff. Cornerstone options include but are not limited to: <ul style="list-style-type: none"> <li>○ How to Build Self-Confidence</li> <li>○ Improving Your Mental Health at Work</li> <li>○ Beginner's Guide to Well-Being at Work</li> </ul> </li> </ul>
--	--

## **Board on Aging and Long Term Care Internal and External Communication Plan**

### Internal Methods of Communication

This Equity and Inclusion Plan will be available to internal audiences including agency leadership, the Board of Directors, management team and frontline staff. Agency leadership includes the Executive Director and the Equity and Inclusion Professional (Legal Counsel), who will work collaboratively on the development, distribution, and implementation of the plan. The management team consists of a Medigap Helpline supervisor, two Long Term Care Ombudsman Program supervisors, a Volunteer Ombudsman Program supervisor, State Ombudsman and an Office Manager. The Equity and Inclusion Professional will act as the point of contact to ensure effective and ongoing communication regarding the Equity and Inclusion Plan. The Equity and Inclusion Professional, the Executive Director, and the Equity and Inclusion Workgroup will gather and use feedback to improve the plan and communication strategies in the future. The feedback gathered will be used by the agency to improve the current plan and used for the creation of future plans. Staff will be provided with a method for providing ongoing feedback based on results from an upcoming staff survey on preferences for providing feedback. Feedback will be gathered from external stakeholders by providing contact information for the Equity and Inclusion Professional and asking for feedback at the time the plan is shared with those stakeholders.

- Supervisors will be educated on the details and status of the plan through an oral presentation on an annual basis at regularly occurring management meetings as well as before recruitment of open positions, with the assistance of DOA Region 1 HR.
- Supervisor training will include the need for supervisors responsible for hiring to use effective recruitment and selection processes, including position description development, balanced interview panels as practicable and interviewing best practices.
- With support and guidance from the Equity and Inclusion Professional and DOA Region 1 HR, supervisors will be afforded access to the knowledge, training, and tools necessary to conduct a more comprehensive recruitment and selection process.
- Supervisors will provide information and support to the staff they supervise, in coordination with the Equity and Inclusion Professional and DOA Region 1 HR.
- The Board of Directors will be informed of details of the plan and status through an oral presentation at the board meeting on an annual basis. The Equity and Inclusion Professional will also provide written information and updates to the Board as needed.

- An e-mail detailing the location of the Equity and Inclusion Plan and the responsibility to read, understand, and implement the plan will be sent from the Equity and Inclusion Professional to all management and staff on an annual basis.
- The final 2024-2026 Equity and Inclusion Plan will be presented to all staff by the Equity and Inclusion Workgroup at Spring 2024 in-service.
- Staff will be reminded of the location, duties and contents of the Equity and Inclusion Plan at one of two staff in-services on an annual basis.
- The agency's Equity and Inclusion Plan is available to all employees on the agency's internal shared network drive or in a print copy to anyone who requests it. As requested, the agency will make the plan available in alternative formats.
- A physical copy of the agency's Equity and Inclusion Plan will be available to employees at the following address: 1402 Pankratz Street, Suite 111, Madison, WI 53714.
- Nondiscrimination and equal opportunity statements and posters are prominently displayed and available in areas frequented and accessible to employees and can be found in the shared network drive.

#### External Methods of Communication

The Equity and Inclusion Plan will be available to the general public and outside agencies upon request. The plan will be available to other state agencies, such as the Department of Health Services, pursuant to grant agreements or upon request.

- The agency's Equity and Inclusion Plan is available in electronic or in a print copy to anyone who requests it. As requested, the agency will make the plan available in alternative formats.
- The agency's website and all job postings will include an equal opportunity employer statement encouraging women, persons of color, and individuals with disabilities to apply in order to recruit a diverse and talented workforce.
- The agency will work to ensure diverse and representative marketing materials.
- The agency's Equity and Inclusion Professional and/or Management Team will review all job postings and interview questions through an equity lens with assistance from DOA Region 1 HR.
- Nondiscrimination and equal opportunity statements and posters are prominently displayed at agency headquarters in Madison and in the shared network drive. Examples of posters displayed include Equal Employment Opportunity is the Law, Employee Rights Under the Fair Labor Standards Act, and the Americans with Disabilities Act Notice to the Public.

- A physical copy of the Equity and Inclusion Plan will be available to contractors, vendors, and members of the public at the following address: 1402 Pankratz Street, Suite 111, Madison, WI 53714.
- An electronic copy of the BOALTC Equity and Inclusion Plan will be available to the public on the agency's website:  
<https://longtermcare.wi.gov/Pages/Home.aspx>



## **Board on Aging and Long Term Care Agency Monitoring and Implementation Plan**

### Agency Monitoring

BOALTC will monitor and measure progress toward the plan's goals and track outcomes within the plan. The Equity and Inclusion Workgroup will continue to meet regularly to monitor progress. The Equity and Inclusion Professional will review progress of the plan on a semi-annual basis or as described within each action item listed.

Progress updates will be provided to the Executive Director every six (6) months, or as requested. Updates will also be provided to DOA HR and BEI as required/requested. Updates will be provided to the Board annually.

Management teams will be kept apprised of these updates by the Equity and Inclusion Professional during management meetings, as applicable.

Tracking and analysis of recruitment and retention will also be conducted by the Equity and Inclusion Officer, Equity and Inclusion Professional, and DOA HR.

### Implementation

The Equity and Inclusion Workgroup will continue to meet regularly to focus on implementation of the plan. While the Equity and Inclusion Workgroup will be primarily responsible for determining the implementation of the plan, BOALTC recognizes that in order to successfully implement this important plan, other agency employees will need to contribute.

Based on best practices provided by the Bureau of Equity and Inclusion (BEI), we will utilize a five-step implementation plan developed by teamwork.com ([Implementation plan: What to include and 5 essential steps \(teamwork.com\)](#)). These five steps are:

1. Define your goals and milestones.
  - Identify what you are trying to accomplish, what needs to happen to reach those goals, and what are the intermediate steps or milestones that demonstrate progress along the path toward the project's goals.
2. Conduct research by interviewing, surveying or observing.
  - Gather the information necessary to build the implementation strategy, including interviewing or surveying various stakeholders, subject matter experts, department leaders, etc., and observing successful implementation plans of other teams or organizations.
3. Brainstorm and map out potential risks.
  - Map out the known risks along with potential impacts and mitigation strategies for each one.

4. Assign and delegate essential tasks.
  - Develop an action plan that lists out and schedules the identified tasks. Assign responsibility and accountability for every task included in the plan in order to bring clarity to who is doing what and when.
5. Finalize your plan and allocate resources.
  - Ensure that the assignment plan from Step 4 is achievable, meaning the delegated staff has the appropriate time and resources to devote to completing the identified tasks.

The goals and milestones will be informed by the goals, strategies, action items, KPI, and outcomes/metrics identified in this plan for each of the overarching categories – recruitment, retention, and agency culture. Each action item listed in this plan identifies which staff are responsible for implementing each item, which will guide the Equity and Inclusion Workgroup when assigning and delegating tasks. The targeted completion dates identified in this plan will provide direction when scheduling tasks.

The Equity and Inclusion Workgroup will meet initially to prioritize action items identified in the 2024-2026 Plan and develop an implementation plan using the five-step process identified above. The Executive Director will be consulted for direction when prioritizing these items for implementation. The Equity and Inclusion Workgroup will determine if subgroups are necessary and appropriate when developing the implementation plan. From there, the Equity and Inclusion Workgroup, as well as any subgroups, will continue to meet regularly to implement the plan and track their progress.