



State of Wisconsin Department of Administration

Tony Evers, Governor
Kathy Blumenfeld, Secretary
Donna Bente, Division Administrator

Date: June 8, 2026

To: Wendy K. Baumann, Department of Financial Institutions, Secretary

From: Donna Bente, Division of Personnel Management, Administrator

Recruitment and Retention Action Plan

This letter serves as both the approval of Department of Financial Institutions' Recruitment and Retention Action Plan for July 1, 2026 - June 30, 2028, and a celebration of the agency's commitment to continued development of a workforce designed to meet the needs of Wisconsin citizens.

Recruitment and Retention Action Plans are intended to be transparent documents so please be sure to post your approved plan on the agency's intranet and internet pages.

While your plan is now approved, please remember that plans are living documents and should remain current. If you have any updates to your plan such as when a major initiative is added or removed, please submit the amended document to BEI email DOADPMBEI@wisconsin.gov. Once the amended plan is approved, you will receive an updated letter of approval.

We look forward to seeing the results from the execution of your plan including improved recruitment and retention of a diverse, innovative, knowledgeable, and talented workforce, advancement of an inclusive culture promoting a sense of belonging for state employees, and development of a workforce from the inside out that understands the needs of Wisconsin citizens and provides the best in customer service.

Sincerely,

Signed by:

Donna Bente

Administrator, Division of Personnel Management
P.O. Box 7855
Madison, WI 53707
dpm.wi.gov

State of Wisconsin
Department of Financial Institutions
Recruitment and Retention Action Plan
July 1, 2026 – June 30, 2028

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Acknowledgement

I have reviewed and I approve this Recruitment and Retention Action Plan. I endorse the goals outlined in the plan and I am committed to supporting implementation of this plan. I affirm the Wisconsin Department of Financial Institutions (DFI) is committed to ensuring equal employment opportunity, freedom from discrimination, and affirmative action in compliance with state laws and policies as well as federal laws.

Appointing Authority

Name: Wendy K. Baumann

Title: DFI Secretary

Date: 5/29/2026

Signature:

A handwritten signature in cursive script that reads "Wendy K. Baumann". The signature is written in dark ink and is positioned to the right of the "Signature:" label.

Agency Roles and Responsibilities

Agency Appointing Authority

- Communicates direction and vision to agency leadership, encouraging their involvement in and commitment to the agency's action plan.
- Appoints agency action plan advisory committee members and an agency action plan officer.
- Reviews and approves the agency's action plan.
- Seeks advice from the agency's action plan advisory committee on related topics and issues.
- Provides support and resources to facilitate implementation of plan goals and actions.

Name: Wendy K. Baumann

Title: DFI Secretary

Email: Wendy.Baumann@dfi.wisconsin.gov

Agency Action Plan Officer

Agency action plan officers are agency employees designated by the agency appointing authority to serve as a designated point of contact and project manager for the agency's action plan.

Duties may include:

- Guiding action plan development, including engaging stakeholders outside the agency's action plan advisory committee.
- Leading action plan implementation, including ensuring a communications plan is developed and executed.
- Monitoring action plan enactment and progress, including coordinating activities required by the action plan and ensuring action plan goals are met in a timely manner or are updated appropriately if conditions shift.
- Communicating with agency leadership and employees to provide updates on action plan activities and status.

Name: Cheryl Rapp

Title: College Investment Program Finance Officer

Email: Cheryl.Rapp@dfi.wisconsin.gov

Agency Action Plan Advisory Committee

An agency's action plan advisory committee is a group of agency employees selected by the appointing authority to lead the action plan development and implementation process.

Duties may include:

- Creating the agency's action plan, including soliciting feedback from other agency employees to inform the development process.
 - Launching the agency's action plan, including a communications plan to ensure all agency employees are made aware of the plan's goals.
 - Implementing the agency's action plan, including continued communications with agency employees to share information and solicit participation in goal-related activities.
 - Advising agency leadership on programming related to action plan activities.
-
- Cheryl Rapp, College Investment Program Finance Officer, Cheryl.rapp@dfi.wisconsin.gov
 - Cynthia Pillar, Consumer Credit Examiner - Journey, Cynthia.pillar1@dfi.wisconsin.gov
 - Leena Oliver, Accountant, Leena.oliver@dfi.wisconsin.gov
 - Alex Carrasco, Financial Specialist – Senior, Alex.carrasco@dfi.wisconsin.gov
 - Charles Benson, Securities Examiner – Advanced, Charles.Benson@dfi.wisconsin.gov
 - Leslie Van Buskirk, Administrator, Leslie.VanBuskirk@dfi.wisconsin.gov
 - Alex Bruins, Financial Examiner – Supervisor, Alex.bruins@dfi.wisconsin.gov
 - Linda Anderson, Records Program Associate, Linda3.anderson@dfi.wisconsin.gov
 - Michael Gavigan, Attorney, Michael.gavigan@dfi.wisconsin.gov
 - Matt Lynch, Chief Legal Counsel, Matthew.lynch@dfi.wisconsin.gov
 - Catherine Haberland, Deputy Secretary, Catherine.haberland@dfi.wisconsin.gov
 - Gina Bailey, Executive Staff Assistant, Gina.bailey@dfi.wisconsin.gov
 - Erin Mason, Charitable Organizations Auditor, Erin.mason1@dfi.wisconsin.gov
 - Lucas Hiltner, Accountant – Senior, Lucas.hiltner@dfi.wisconsin.gov
 - Brooks Martin, Securities Examiner - Advanced, Brooks.martin@dfi.wisconsin.gov

Workforce Analysis

Agency Overview

- Total Employee Count: 142
 - Permanent Classified Employee Count: 132
 - Full-Time Equivalent (FTE) Total: 131.54
- Average Years of State Service: 10
- Average Age: 44
- Average Hourly Pay Rate: \$40.03
- Median Hourly Pay Rate: \$38.52
- Vacancy Rate: 1.5%
- Turnover Rate: 8.4%
- Proportion of Fair Labor and Standards Act (FLSA) Eligible Employees: 33.33%
- Proportion of “Protective” Occupation Employees: 0%
- Proportion of Executive/Management Employees: 13.64%
- Proportion of Supervisory (Non-management/Executive) Employees: 3.79%

Recruitment Data

Table 1: Applicant and Hire Data by Gender

Gender	Applicant Count	Applicant Proportion	Hire Count	Hire Proportion
Male	214	54.45%	8	61.54%
Female	170	43.26%	5	38.46%
Not Indicated	9	2.29%	N/A	N/A

Table 2: Applicant and Hire Data by Race and Ethnicity

Race and Ethnicity	Applicant Count	Applicant Proportion	Hire Count	Hire Proportion
American Indian or Alaskan Native	2	0.51%	0	0%
Asian	43	10.94%	0	0%
Black or African American	30	7.63%	0	0%
Hispanic or Latino	29	7.38%	1	7.69%
Native Hawaiian or Pacific Islander	0	0%	0	0%
Two or More Races	12	3.05%	0	0%
White	263	66.92%	11	84.62%
Not Indicated	14	3.56%	1	7.69%

Table 3: Applicant and Hire Data by Disability Status

Disability Status	Applicant Count	Applicant Proportion	Hire Count	Hire Proportion
Disabled	61	15.52%	4	30.77%
Severely Disabled	N/A	N/A	0	0%
Not Indicated	332	84.48%	9	69.23%

Table 4: Applicant and Hire Data by Wisconsin Works (W-2) Status

Wisconsin Works (W-2) Status	Applicant Count	Applicant Proportion	Hire Count	Hire Proportion
Eligible for W-2	21	5.34%	0	0%
Enrolled in W-2	N/A	N/A	0	0%

Table 5: Applicant and Hire Data by Veteran Status

Veteran Status	Applicant Count	Applicant Proportion	Hire Count	Hire Proportion
Veteran	25	6.36%	2	15.38%
Disabled Veteran	9	2.29%	1	7.69%
Not Indicated	368	93.64%	11	84.62%

Employee Data

Table 6: Agency Gender Compared to the Labor Market and State Population

Gender	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Male	61	45.52%	51.9%	50.1%
Female	73	54.48%	47.5%	49.9%
Not Indicated	N/A	N/A	N/A	N/A

Table 7: Agency Race and Ethnicity Compared to the Labor Market and State Population

Race and Ethnicity	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
American Indian or Alaskan Native	2	1.49%	1.3%	1.2%
Asian	4	2.99%	2.9%	3.5%
Black or African American	1	0.75%	4.8%	6.7%
Hispanic or Latino	4	2.99%	7.0%	8.4%
Native Hawaiian or Pacific Islander	0	0%	0.04%	0.1%

Race and Ethnicity	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Two or More Races	2	1.49%	5.5%	2.4%
White	114	85.07%	83.3%	86.1%
Not Indicated	7	5.22%	N/A	N/A

Table 8: Agency Disability Status Compared to the Labor Market and State Population

Disability Status	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Disabled	20	14.93%	5.7%	8.7%
Severely Disabled	0	0%	N/A	N/A
Not Indicated	114	85.07%	94.1%	91.3%

Table 9: Agency Veteran Status Compared to the Labor Market and State Population

Veteran Status	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Veteran	9	6.72%	4.6%	5.0%
Disabled Veteran	3	2.24%	N/A	N/A
Not Indicated	125	93.28%	95.4%	95.0%

Table 4: Agency Employee Age Compared to the Labor Market and State Population

Age	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Under 20	0	0%	N/A	20.8%
20 – 29 years old	14	10.45%	N/A	13.0%
30 – 39 years old	38	28.36%	N/A	12.9%
40 – 49 years old	40	29.85%	N/A	12.2%
50 – 59 years old	26	19.4%	N/A	11.8%
60 plus years old	16	11.94%	N/A	29.9%

Table 5: Agency Years of Service Compared to the Labor Market and State Population

Years of Service	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
0 – 4 years	51	38.06%	N/A	N/A
5 – 9 years	28	20.9%	N/A	N/A
10 – 14 years	30	22.39%	N/A	N/A
15 – 19 years	6	4.48%	N/A	N/A
20 – 24 years	4	2.99%	N/A	N/A
25 – 29 years	5	3.73%	N/A	N/A
30 – 35 years	5	3.73%	N/A	N/A
More Than 35 years	5	3.73%	N/A	N/A

Table 6: Agency Separation Status Compared to the Labor Market and State Population

Separation Status	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Voluntary	7	5.34%	N/A	N/A
Involuntary*	1	0.76%	N/A	N/A
Retirement	3	2.29%	N/A	N/A

*Involuntary separations include employer separations, employee death, and medical separations.

Table 7: Agency Retirement Eligibility Compared to the Labor Market and State Population

Retirement Eligibility	Agency Count	Agency Proportion	Wisconsin Labor Market	Wisconsin Population
Immediate	11	8.21%	N/A	N/A
Within 5 years	26	19.4%	N/A	N/A
Within 10 years	36	26.87%	N/A	N/A
More than 10 years	98	73.13%	N/A	N/A

Geographic Data

Table 8: Agency Employee Work and Home Location by County

County	# of Employees Headquartered in County	Proportion of Employees Headquartered in County	# of Employees Residing in County	Proportion of Employees Residing in County
Adams	0	0%	0	0%
Ashland	0	0%	0	0%

County	# of Employees Headquartered in County	Proportion of Employees Headquartered in County	# of Employees Residing in County	Proportion of Employees Residing in County
Barron	1	0.76%	1	0.76%
Bayfield	0	0%	0	0%
Brown	4	3.03%	5	3.79%
Buffalo	0	0%	0	0%
Burnett	0	0%	0	0%
Calumet	0	0%	0	0%
Chippewa	0	0%	0	0%
Clark	0	0%	0	0%
Columbia	0	0%	1	0.76%
Crawford	1	0.76%	1	0.76%
Dane	94	71.21%	75	56.82%
Dodge	0	0%	2	1.52%
Door	0	0%	0	0%
Douglas	0	0%	0	0%
Dunn	0	0%	0	0%
Eau Claire	2	1.52%	2	1.52%
Florence	0	0%	0	0%
Fond du Lac	1	0.76%	1	0.76%
Forest	0	0%	0	0%
Grant	1	0.76%	1	0.76%
Green	0	0%	1	0.76%
Green Lake	0	0%	0	0%
Iowa	0	0%	0	0%
Iron	0	0%	0	0%
Jackson	0	0%	0	0%
Jefferson	0	0%	0	0%
Juneau	1	0.76%	1	0.76%
Kenosha	0	0%	0	0%
Kewaunee	0	0%	0	0%
La Crosse	1	0.76%	1	0.76%
Lafayette	1	0.76%	1	0.76%
Langlade	0	0%	0	0%
Lincoln	0	0%	0	0%
Manitowoc	1	0.76%	1	0.76%
Marathon	1	0.76%	1	0.76%
Marinette	0	0%	0	0%
Marquette	0	0%	2	1.52%

County	# of Employees Headquartered in County	Proportion of Employees Headquartered in County	# of Employees Residing in County	Proportion of Employees Residing in County
Menominee	0	0%	0	0%
Milwaukee	4	3.03%	5	3.79%
Monroe	0	0%	0	0%
Oconto	0	0%	0	0%
Oneida	0	0%	0	0%
Outagamie	4	3.03%	4	3.03%
Ozaukee	0	0%	2	1.52%
Pepin	0	0%	0	0%
Pierce	0	0%	0	0%
Polk	0	0%	0	0%
Portage	0	0%	0	0%
Price	0	0%	0	0%
Racine	1	0.76%	1	0.76%
Richland	0	0%	0	0%
Rock	2	1.52%	4	3.03%
Rusk	0	0%	0	0%
St. Croix	1	0.76%	1	0.76%
Sauk	2	1.52%	7	5.3%
Sawyer	0	0%	0	0%
Shawano	0	0%	0	0%
Sheboygan	1	0.76%	1	0.76%
Taylor	0	0%	0	0%
Trempealeau	1	0.76%	1	0.76%
Vernon	0	0%	0	0%
Vilas	1	0.76%	1	0.76%
Walworth	0	0%	0	0%
Washburn	0	0%	0	0%
Washington	4	3.03%	4	3.03%
Waukesha	0	0%	1	0.76%
Waupaca	0	0%	0	0%
Waushara	0	0%	0	0%
Winnebago	1	0.76%	2	1.52%
Wood	1	0.76%	1	0.76%
Out of State	0	0%	0	0%

Trends in Employee Data

Table 9: Changes in Gender Over Time

Gender	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Male	(+2)	(+1.5%)	(+5)	(+2.1%)
Female	(-2)	(-1.5%)	(0)	(-2.1%)
Not Indicated	N/A	N/A	N/A	N/A

Table 10: Changes in Race and Ethnicity Over Time

Race and Ethnicity	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
American Indian or Alaskan Native	(0)	(0%)	(0)	(-0.1%)
Asian	(0)	(0%)	(-1)	(-0.9%)
Black or African American	(-1)	(-0.7%)	(-3)	(-2.4%)
Hispanic or Latino	(+1)	(+0.7%)	(-2)	(-1.7%)
Native Hawaiian or Pacific Islander	(0)	(0%)	(0)	(0%)
Two or More Races	(0)	(0%)	(0)	(-0.1%)
White	(0)	(0%)	(+9)	(+3.7%)
Not Indicated	(0)	(0%)	(+2)	(+1.3%)

Table 11: Changes in Disability Status Over Time

Disability Status	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Disabled	(-3)	(-2.2%)	(+5)	(+3.3%)
Severely Disabled	(0)	(0%)	(0)	(0%)
Not Indicated	(+3)	(+2.2%)	(0)	(-3.3%)

Table 12: Changes in Veteran Status Over Time

Veteran Status	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Veteran	(+1)	(+0.7%)	(-1)	(-1%)
Disabled Veteran	(+1)	(+0.7%)	(-1)	(-0.9%)
Not Indicated	(-1)	(-0.7%)	(+6)	(+1%)

Table 19: Changes in Age Over Time

Age	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Under 20	(0)	(0%)	(0)	(0%)
20 – 29 years old	(-2)	(-1.5%)	(-6)	(-5.1%)
30 – 39 years old	(-4)	(-3%)	(-3)	(-3.4%)
40 – 49 years old	(+9)	(+6.7%)	(+21)	(+15.1%)
50 – 59 years old	(-2)	(-1.5%)	(-7)	(-6.2%)
60 plus years old	(-1)	(-0.7%)	(0)	(-0.5%)

Table 13: Changes in Years of Service Over Time

Years of Service	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
0 – 4 years	(-3)	(-2.2%)	(+8)	(+4.7%)
5 – 9 years	(0)	(0%)	(-7)	(-6.2%)
10 – 14 years	(+3)	(+2.2%)	(+10)	(+6.9%)
15 – 19 years	(+1)	(+0.7%)	(-2)	(-1.7%)
20 – 24 years	(-2)	(-1.5%)	(-3)	(-2.4%)
25 – 29 years	(+2)	(+1.5%)	(+3)	(+2.2%)
30 – 35 years	(-1)	(-0.7%)	(-6)	(-4.8%)
More Than 35 Years	(0)	(-0.7%)	(+2)	(+1.4%)

Table 14: Changes in Separation Status Over Time

Separation Status	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Voluntary	(-3)	(-2.6%)	(-3)	(-2.8%)
Involuntary*	(-2)	(-1.6%)	(0)	(0%)
Retirement	(0)	(-0.1%)	(+1)	(+0.7%)

*Involuntary separations include employer separations, employee death, and medical separations.

Table 15: Changes in Retirement Eligibility Over Time

Retirement Eligibility	Count of One-Year Employee Change	Proportion of One-Year Employee Change	Count of Three-Year Employee Change	Proportion of Three-Year Employee Change
Immediate	(+2)	(+1.5%)	(+1)	(+0.5%)
Within 5 years	(0)	(0%)	(+1)	(+0%)
Within 10 years	(-3)	(-2.2%)	(-3)	(-3.4%)
More than 10 years	(+3)	(+2.2%)	(+8)	(+3.4%)

Source:

- The above information came from the Human Capital Management System on March 04, 2026.
- Applicant, Hires, and Employee data 01/01/2025 – 12/31/2025.
- The calendar years ending 12/31/2024 and 12/31/2025 represent the one-year comparable data, and the years ending 12/31/2022 and 12/31/2025 were used for the three-year change comparison.
- Wisconsin Works data was taken from the 2025 FY Wisconsin Works Annual Report

Equity & Inclusion – Recruitment Goals 2026 - 2028

Goal Framework: Recruitment

Prioritize outreach to candidates from diverse backgrounds.

What is your concrete and tangible goal?

The Equity & Inclusion (EI) Committee objective is to enhance the inclusivity and equity of DFI's recruitment process. This involves engaging underrepresented groups through broadened outreach, developing strategic partnerships, participating in diversity-focused events, advancing fair hiring process training, and ensuring recruitment materials reflect a strong commitment to equity and inclusion. Progress will be measured using clear, actionable benchmarks.

How will you track progress?

Progress will be tracked by systematically documenting each initiative—such as the number of outreach communications sent, events attended, and participants completing fair process training—using tools like spreadsheets and checklists. The committee will conduct regular reviews, compare outcomes to set Key Performance Indicators (KPIs), and compile summary reports to assess and communicate results. [Please reference Appendix, Recruitment Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be evident when all specified KPIs are met or exceeded, supporting documentation is available for each action, there is a measurable increase in engagement from diverse candidates, and positive changes are observed in the recruitment process. Tangible improvements and data will substantiate the achievement of the committee's EI objectives.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

The goal presents challenges because it seeks systemic change without direct authority over hiring decisions or access to HR resources. However, it remains actionable due to its division into manageable tasks. The committee will utilize available resources such as member expertise, contact networks, basic digital tracking tools, access to training materials, and support from leadership or collaborating departments.

How does your goal satisfy the recruitment objective?

This goal aligns with and fulfills the recruitment objective by broadening candidate outreach, fostering meaningful partnerships, ensuring fair evaluation practices, improving the inclusivity of recruitment materials, and establishing a framework for ongoing accountability. Collectively, these measures attract more diverse applicants and foster a more equitable hiring environment.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2027. This timeline allows for the execution, tracking, and evaluation of all planned initiatives across a full annual cycle.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Achievement of the goal by the target date is attainable with sustained effort and systematic monitoring. Interim markers include quarterly progress reviews, a comprehensive mid-year assessment, ongoing

documentation of all activities, prompt responses to collected feedback, and a culminating annual report to evaluate whether all KPIs and EI outcomes have been fulfilled.

How/Why did we come to this goal?

The Department of Financial Institution's workforce data analysis indicates we are below the Wisconsin Workforce averages in inclusive hiring. Meeting this objective will help ensure that the agency's recruitment processes are fair, inclusive, and broad, resulting in a wider and more varied pool of talented candidates from across the state.

Equity & Inclusion – Retention Goals 2026 - 2028

Goal Framework: Retention

Develop ways to recognize employee achievements.

What is your concrete and tangible goal?

Develop and implement effective methods to recognize employee achievements through consistent and meaningful internal communication strategies.

How will you track progress?

Progress will be monitored through Recognition Program Workgroup meetings, tracking participation and recognition activities in centralized tools, and collecting employee feedback through surveys and informal input channels. [Please reference Appendix, Retention Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be achieved when multiple recognition methods have been piloted, evaluated for effectiveness, and refined into a sustainable approach. Additional indicators include positive employee feedback and increased engagement with recognition initiatives.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

This goal is challenging due to the need to ensure equitable recognition across divisions, roles, and employee contributions. However, it is actionable through structured testing and evaluation of recognition methods. Resources include internal communication platforms, newsletters, staff meetings, and both formal and informal recognition tools such as written acknowledgments, team-based initiatives, and 'Smile Files' (physical and digital boards).

How does your goal satisfy the retention objective?

Consistent and meaningful recognition contributes to employee engagement, job satisfaction, and a sense of value within the organization. These factors are strongly associated with increased employee retention and organizational commitment.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, the goal is achievable within the designated timeframe. Interim milestones include testing at least one recognition method per quarter, conducting regular workgroup meetings, and reviewing feedback to refine and improve recognition practices.

How/Why did we come to this goal?

Address the gap in employees in the 10 to 25-year seniority range, as well as the risks associated with a significant percentage of the workforce eligible for retirement in the next five years.

Equity & Inclusion – Retention Goals 2026 - 2028

Goal Framework: Retention

Promote project and training opportunities.

What is your concrete and tangible goal?

Increase employee participation in professional development, training, and internal career advancement opportunities to support long-term engagement and retention.

How will you track progress?

Progress will be tracked through participation data, employee engagement surveys, and feedback collected through tools such as stay interviews and performance evaluations. Leadership will monitor trends and assess engagement levels across divisions. [Please reference Appendix, Retention Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be demonstrated by increased participation in development opportunities, improved employee awareness of available resources, and growth in internal mobility, including transfers and promotions within the agency.

Describe how your goal is challenging, but actionable. Identify resource you expect to use. This goal is challenging because employee motivations and career goals vary widely, and external factors may influence retention decisions. Despite this, the goal is actionable through coordinated efforts to promote opportunities, gather feedback, and respond to identified needs. Resources include leadership support, internal data tracking, employee surveys, and collaboration across divisions.

How does your goal satisfy the retention objective?

By fostering career growth and development opportunities, the agency creates an environment where employees are more likely to remain engaged and pursue long-term careers within the organization, even if their roles evolve over time.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, this goal is achievable. Interim markers include regular analysis of participation data, monitoring survey responses, and conducting periodic check-ins between supervisors and employees to assess development needs and progress.

How/Why did we come to this goal?

We believe investing in employee growth and development strengthens engagement, builds institutional knowledge, and supports long-term retention. By promoting training, professional development, and internal advancement opportunities, we create a workplace culture where employees feel valued, supported in their career goals, and empowered to grow within the organization.

Equity & Inclusion – Culture Goals 2026 - 2028

Goal Framework: Culture

Increase education of diverse cultures to internal employees.

What is your concrete and tangible goal?

Foster a more inclusive and engaging workplace culture by implementing regular “lunch and learn” sessions that highlight diverse cultural perspectives and experiences.

How will you track progress?

Progress will be tracked through documentation of sessions held, attendance rates, and participant feedback collected after each event. The committee will review this information during regular meetings to assess effectiveness and identify opportunities for improvement. [Please reference Appendix, Culture Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be measured by consistently hosting at least one session per quarter, maintaining strong participation levels, and receiving positive feedback indicating increased cultural awareness and employee engagement.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

This goal requires consistent planning, coordination, and employee participation, which can be challenging in a busy work environment. However, it is achievable through structured scheduling, clear communication, and shared responsibility. Resources include staff volunteers, meeting or virtual platforms, internal communication tools, and feedback mechanisms.

How does your goal satisfy the culture objective?

This initiative promotes inclusivity by creating opportunities for employees to share their experiences and learn from one another, strengthening mutual respect and fostering a more connected and supportive workplace environment.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, the goal is achievable. Interim benchmarks include hosting at least one session per quarter, monitoring participation levels, and incorporating feedback to improve future sessions.

How/Why did we come to this goal?

Committee members noted, based on their own experience and interactions with colleagues, that enhancing employee knowledge and awareness of topics relating to equity and inclusion increases their commitment to fostering respectful and inclusive work environment and improves the overall organizational culture.

Equity & Inclusion – Culture Goals 2026 - 2028

Goal Framework: Culture

Request feedback from internal employees on how to create a more diverse and friendly environment.

What is your concrete and tangible goal?

Increase employee participation in professional development, training, and internal career advancement opportunities to support long-term engagement and retention.

How will you track progress?

Progress will be tracked through participation data, employee engagement surveys, and feedback collected through tools such as stay interviews and performance evaluations. Leadership will monitor trends and assess engagement levels across divisions. [Please reference Appendix, Culture Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be demonstrated by increased participation in development opportunities, improved employee awareness of available resources, and growth in internal mobility, including transfers and promotions within the agency.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

This goal is challenging because employee motivations and career goals vary widely, and external factors may influence retention decisions. Despite this, the goal is actionable through coordinated efforts to promote opportunities, gather feedback, and respond to identified needs. Resources include leadership support, internal data tracking, employee surveys, and collaboration across divisions.

How does your goal satisfy the culture objective?

By fostering career growth and development opportunities, the agency creates an environment where employees are more likely to remain engaged and pursue long-term careers within the organization, even if their roles evolve over time.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, this goal is achievable. Interim markers include regular analysis of participation data, monitoring survey responses, and conducting periodic check-ins between supervisors and employees to assess development needs and progress.

How/Why did we come to this goal?

Drawing on their own experiences and feedback from colleagues, committee members observed that a welcoming, inclusive, and supportive workplace starts with listening to employees and valuing diverse perspectives. By seeking feedback from internal stakeholders, we can better understand employee experiences, identify opportunities for improvement, and foster an environment where all individuals feel respected, engaged, and empowered to succeed.

Equity & Inclusion – Veteran Hires 2026 - 2028

Goal Framework: Veteran Hires

What is your concrete and tangible goal?

Increase the recruitment, hiring, and retention of veterans by implementing broadened outreach strategies, enhancing hiring practices, and improving awareness of transferable military skills within the recruitment process.

How will you track progress?

Progress will be tracked through applicant and hiring data, documentation of outreach efforts and partnerships, participation in veteran-focused events, and completion rates of hiring manager training. Data will be reviewed quarterly to assess trends and effectiveness. [Please reference Appendix, Veteran Hires Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be demonstrated by an increase in veteran applicants and hires, improved hiring outcomes for veterans, and evidence that hiring managers are effectively recognizing and valuing military experience in the recruitment process.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

This goal is challenging due to competition for veteran talent and potential gaps in translating military experience to civilian roles. However, it is actionable through broadened outreach, training, and partnerships. Resources include collaboration with veteran organizations, HR expertise, training materials, and workforce data.

How does your goal satisfy the veteran hires objective?

This goal supports the recruitment objective by expanding access to a highly skilled and experienced talent pool, strengthening inclusive hiring practices, and ensuring veterans are effectively considered and supported throughout the hiring process.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, this goal is achievable. Interim markers include establishing partnerships within the first year, participating in at least one veteran-focused event annually, completing hiring manager training each year, and conducting quarterly reviews of applicants and hiring data.

How/Why did we come to this goal?

Section 230.042 of the Wisconsin Statutes requires agencies of 100 or more employees to prepare and implement plans to employ qualified veterans. We value the leadership, adaptability, discipline, and diverse experiences veterans bring to the workforce. By strengthening veteran recruitment, hiring, and retention efforts, we aim to create meaningful career pathways for those who have served while building a stronger, more inclusive organization that recognizes and benefits from transferable military skills and experiences.

Equity & Inclusion – Wisconsin Works Hires 2026 - 2028

Goal Framework: Wisconsin Works Hires

What is your concrete and tangible goal?

Increase employment opportunities for Wisconsin Works (W-2) participants by strengthening partnerships, expanding outreach, and implementing inclusive hiring practices that support candidates with nontraditional career paths.

How will you track progress?

Progress will be tracked through outreach activity logs, partnership development records, applicant and hiring data, and feedback from workforce partners. Data will be reviewed regularly to measure effectiveness and inform adjustments. [Please reference Appendix, Wisconsin Works Hires Goals for specific measures.](#)

How will you know when you have achieved your goal?

Success will be measured by increased engagement with W-2 partners, growth in the number of W-2 applicants, and improved hiring outcomes for individuals participating in the W-2 program.

Describe how your goal is challenging, but actionable. Identify resource you expect to use.

This goal is challenging due to potential barriers such as limited awareness of opportunities, gaps in work experience, or access to resources among W-2 participants. However, it is actionable through intentional outreach, strong partnerships, and inclusive hiring practices. Resources include collaboration with workforce agencies, HR support, training materials, and internal data tracking.

How does your goal satisfy the Wisconsin works hires objective?

This goal advances the recruitment objective by broadening access to employment opportunities, supporting economic mobility, and ensuring the agency's hiring practices are inclusive of individuals from diverse socioeconomic backgrounds.

What is the target completion date for the goal?

The designated completion date for achieving this goal is June 30, 2028.

Can you achieve your goal by the target completion date? What interim markers can you use to ensure you are on track?

Yes, the goal is achievable within the established timeframe. Interim markers include establishing initial partnerships within the first year, conducting quarterly outreach efforts, identifying appropriate roles annually, and regularly reviewing applicants and hiring data to track progress.

How/Why did we come to this goal?

Section 230.147 of the Wisconsin Statutes requires agencies of 100 or more employees to prepare and implement plans of action to employ Wisconsin Works (W-2) participants. We believe expanding employment opportunities for Wisconsin Works (W-2) participants strengthens our workforce, supports economic mobility, and promotes equitable access to meaningful careers. By building partnerships, broadening outreach, and embracing inclusive hiring practices, we can create pathways for individuals with nontraditional career experiences to contribute their skills, grow professionally, and succeed within our organization.

Bureau of Equity and Inclusion (BEI) Action Plan Approval Criteria

1. Plan Component – The appointing authority acknowledgement has been signed and dated.

☐ Included or Complete ☐ Not Included or Incomplete

Comments:

[Click or tap here to enter comments.](#)

2. Plan Component - The roles and responsibilities section has been completed and includes an agency action plan officer, and agency action plan advisory committee members have been identified.

☐ Included or Complete ☐ Not Included or Incomplete

Comments:

[Click or tap here to enter comments.](#)

3. Plan Component - The required workforce analysis has been completed.

☐ Included or Complete ☐ Not Included or Incomplete

Comments:

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4. Plan Component - SMART goals have been developed for each of the five objectives. Measures of success and a path to achieve it are clearly defined.

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Appendix

Recruitment Goals – 2026-2028.....25

Retention Goals – 2026-2028.....27

Culture Goals – 2026-2028.....28

Veteran Hires – 2026-202829

Wisconsin Works Hires – 2026-202830

Equity & Inclusion – Recruitment Goals 2026 - 2028

Appendix

Recruitment Goals – 2026-2028

Prioritize outreach to candidates from diverse backgrounds, including underrepresented groups, veterans, and Wisconsin Works participants. Build partnerships with professional and community organizations that promote diversity and participate in career events focused on inclusion. Provide ongoing fair process training for interview panel members to ensure fair and equitable hiring practices. Regularly assess committee efforts to strengthen a workforce that reflects the broader community.

Actions or Strategies	Specific Actions	Key Performances Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Outreach & Partnership	Share job posting resources with five additional organizations and networks	Number of resources shared with additional organizations each quarter	Increased reach to underrepresented candidates	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Quarterly
	Maintain and update list of partner organizations	Up-to-date contact list reviewed/updated at least semi-annually	Comprehensive and current outreach list	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Semi-annually
	Establish partnerships with diversity-focused organizations	Number of active partnerships or collaborations per year	Broader support and access to diverse talent pools	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
Career Events & Engagement	Coordinate/participate in diversity-focused career events	Number of events attended or organized per year	Greater visibility and engagement with diverse candidates	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
	Collect and act on feedback from career events	Amount of feedback collected and improvements implemented	Improved effectiveness of outreach and event participation	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	After each event

Equity & Inclusion – Recruitment Goals 2026 - 2028

Actions or Strategies	Specific Actions	Key Performances Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Training & Capacity Building	Promote and track fair process training for panel members	Percentage of interview panel members completing training per year	Fair and equitable interview processes	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
	Recommend improvements to fair process training content	Number of recommendations made and adopted for training improvements	More effective training addressing committee observations	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
Evaluation & Continuous Improvement	Review recruitment data and assess outreach/training effectiveness	Number of recruitment data reviews and assessment reports per year	Ongoing improvement of committee initiatives	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
	Advise on barriers to equitable hiring and recommend improvements	Number of recommendations provided to leadership per year	Reduction of identified barriers in hiring practices	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
Inclusive Materials & Communication	Review job postings and materials for inclusive language/practices	Number of materials reviewed for inclusivity annually	More inclusive and appealing recruitment materials	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually
	Ensure materials reflect EI commitment	Percentage of materials updated to reflect equity/inclusion best practices	Clear demonstration of organizational commitment to EI	DFI EI Committee Assisted by: Region 1 - EIO Region 1 - HR Region 1 - Training Officer	Annually

Associated Training	- Fair hiring process training for interview screening / hiring panel members. - Educate employees, recruitment staff, and interview screening / hiring panel members on equity and inclusion plan goals and progress. - Train discussion facilitators on how to facilitate conversation regarding sensitive topics.
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Equity & Inclusion – Retention Goals 2026 - 2028

Retention Goals – 2026-2028

Address the gap in employees in the 10 to 25-year seniority range, as well as the risks associated with a significant percentage of the workforce eligible for retirement in the next five years.

Actions or Strategies	Specific Actions	Key Performances Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Develop Ways to Recognize Employee Achievements	Promote recognition of employee achievements in various internal communications	Recognition program methods trial data	Functional employee recognition program for DFI employees	Strategic initiative 1.3 workgroup / DFI Leadership	June 30, 2028
Promote Project and Training Opportunities	Promote staff participation in projects, training, and/or other career engagement opportunities	Participation rates (survey feedback; other data)	Employees gain knowledge and skills to build career engagement and progress goals within DFI	DFI Leadership	June 30, 2028

*“Employee(s)” include Veteran employees, Wisconsin Works employees, and employees in the mid-seniority range.

Equity & Inclusion – Culture Goals 2026 - 2028

Culture Goals – 2026-2028

Ensure and enhance employee knowledge and awareness of equity and inclusion topics in order to increase commitment to fostering a respectful and inclusive work environment.

Actions or Strategies	Specific Actions	Key Performances Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Increase Education of Diverse Culture of Internal Stakeholders	Promote all staff to submit articles for the Equity & Inclusion Corner section of the DFI internal newsletter	Keep spreadsheet with staff that submit articles for newsletter	Increased participation of all DFI staff, not just the EI committee	DFI EI Committee	Ongoing
Request for Feedback from Internal Stakeholders on How to Create a More Diverse Friendly Environment	DFI EI Committee to send out a EI specific survey	Reach out to other EI professionals' enterprise-wide for appropriate questions	Increased knowledge of what DFI staff want to create a more diverse environment	DFI EI Committee	Ongoing

Equity & Inclusion – Veteran Hires 2026 - 2028

Veteran Hires – 2026-2028

Actions or Strategies	Specific Actions	Key Performance Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Broadened Outreach	Partner with veteran-serving organizations and workforce programs	Number of partnerships established annually	Increased veteran applicant pool	DFI EI Committee / HR	June 30, 2028
Recruitment Practices	Promote veteran-friendly language in job postings and highlight transferable skills	% of job postings reviewed and updated	Improved accessibility of postings for veterans	HR / Hiring Managers	Annually
Career Events	Participate in veteran-focused career fairs and networking events	Number of events attended annually	Increased awareness of DFI among veteran candidates	DFI EI Committee	Annually
Hiring Process	Train hiring managers on recognizing military experience as relevant professional experience	% of hiring managers completing training	More equitable evaluation of veteran candidates	HR / Training Officer	Annually
Data Monitoring	Track veteran applicant and hiring data	Quarterly review of applicant and hire data	Improved veteran hiring outcomes over time	HR / EI Committee	Quarterly

Equity & Inclusion – Wisconsin Works Hires 2026 - 2028

Wisconsin Works Hires – 2026-2028

Actions or Strategies	Specific Actions	Key Performance Indicators	Outcome/Metric	Responsible Staff/Office	Target Completion Date
Program Partnerships	Establish connections with W-2 agencies and workforce development partners	Number of partnerships established annually	Increased pipeline of W-2 candidates	DFI EI Committee / HR	June 30, 2028
Outreach & Awareness	Share job opportunities with W-2 participants and partner organizations	Number of outreach communications per quarter	Increased awareness of DFI opportunities	HR / EI Committee	Quarterly
Entry-Level Opportunities	Identify and promote entry-level roles suitable for W-2 participants	Number of roles identified and promoted	Improved access to employment opportunities	HR / Division Leadership	Annually
Supportive Hiring Practices	Provide guidance to hiring managers on evaluating nontraditional career paths	% of hiring managers receiving guidance/training	More inclusive hiring practices	HR / Training Officer	Annually
Data Monitoring	Track W-2 applicant and hiring data	Quarterly review of applicant and hire data	Measurable increase in W-2 participation in hiring processes	HR / EI Committee	Quarterly

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