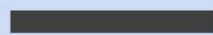




VILLAGE OF SHOREWOOD

# DEI Strategic Plan



PREPARED BY  
Deborah C. Blanks, PhD.  
**Kairo Communications**

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### Village Board of Trustees

- ◆ Ann McCullough McKaig, President Jim
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### Village Administration

- ◆ Rebecca Ewald, Village Manager
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- ◆ Bart Griepentrog, Director of Planning and Development
- ◆ Leeann Butschlick, Director of Public Works
- ◆ Heather Wurth, Chief of Police, Shorewood Police Department
- ◆ Fernando Santiago, Captain, Shorewood Police Department
- ◆ Jen Gerber, Former Director of Public Library
- ◆ Hayley Johnson, Interim Director of Public Library
- ◆ Elizabeth Price, Director of Senior Resource Center

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### Kairo Communications LLP Project Team

- ◆ Project Manager: Deborah Blanks, PhD

#### *Project Team members:*

- ◆ Katie Pritchard, PhD
- ◆ David Pate, PhD
- ◆ Karla Harvey
- ◆ Geraud Blanks

### Graphic Designers

- ◆ Harvey Enterprises - Strategic Plan
- ◆ Angela Andre Design Services - Strategic Plan and Resource Guide

## INTRODUCTION

The Village of Shorewood is influenced by internal and external dynamics which must be considered in the development of a strategic plan focused on diversity, equity, and inclusion. As a consultant, Kairo can hold a professional view about the content of a plan, the timing of implementation, and the role of stakeholders in moving the plan forward. But each organization varies in its history, governance structure, jurisdictional constraints, and operational priorities...and the strategic plan must reflect this.

The historical legacy of Shorewood and Milwaukee County are intertwined. The environmental scan Kairo conducted provided insight regarding how regional and community actions created a homogenous, privileged, segregated Shorewood. This history laid the foundation on which the Village must chart a different course and create a new equity paradigm.

As a governmental body, the Village is impacted by a specific set of opportunities and constraints - mandates, legal requirements, scope of authority, fiduciary responsibility, and community needs. Balancing these competing interests often results in government making slow, incremental change. Those who have been marginalized feel the urgency, the immediacy for change. Those who have been systematically excluded often feel incremental change is too slow, subject to changes in staff, leadership, and organizational priorities which can make progress a fragile commodity, too easily thwarted or dismantled. But incremental change is the reality of how government often operates and the plan respects that factor.

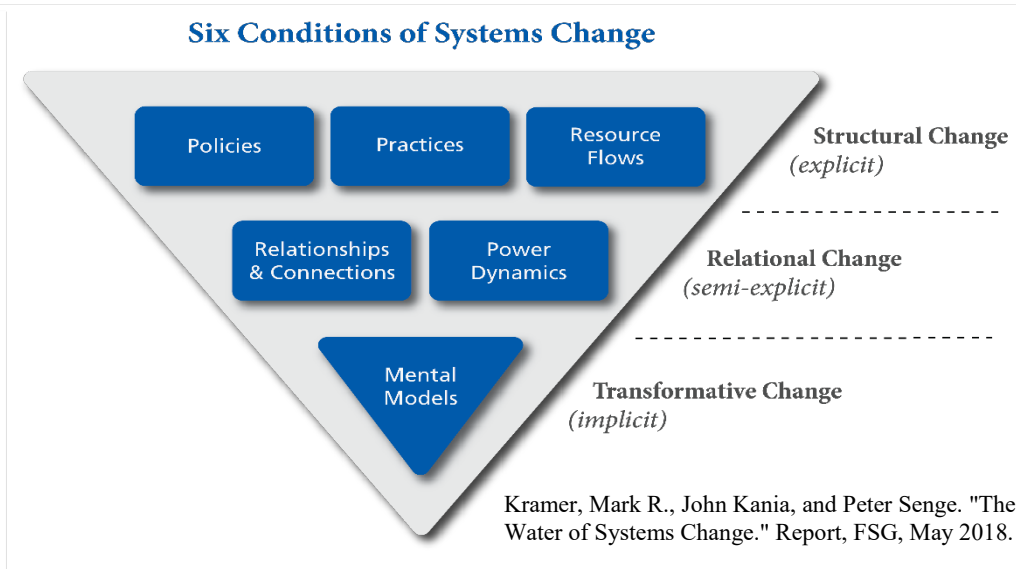
While acknowledging Shorewood's history and disparities, some individuals may question the need for an emphasis on DEI in a well-respected, progressive, high functioning entity. This is a community that has racial diversity. Twenty percent of the residents are people of color; ten percent of Village staff are people of color. Still, diversity does not automatically translate into equity and inclusion. Diversity does not always translate into quality participation in the decision-making process, fair access to opportunity, or acceptance in the mainstream culture.

For Village staff, this strategic plan may feel like one more responsibility to add to a long list of responsibilities. In interviews with Kairo Communication, staff have communicated three major themes: 1) a fear about how achievement of diversity, equity, and inclusion goals would affect their employment with the Village. 2) a sense of being overwhelmed by their job responsibilities, and (3) a concern about their department's lack of capacity to take on more. These are legitimate feelings of staff who are highly competent, committed, and motivated to perform well on behalf of the Village.

Shorewood may be challenged to address staff concerns about capacity and the sense of being overwhelmed – these are organizational issues that can adversely impact staff participation in strategic plan implementation. The strategic plan is not designed to negatively impact the employment of current employees, rather it is open to working with employees to create a more inclusive, productive environment. However, while the plan

should not be driven by these concerns, the plan should identify ways to respectfully balance staff concerns with the responsibility to effectively address issues of inequity and exclusion.

The Village of Shorewood has aligned its equity work with allies including Milwaukee County, Governmental Alliance for Racial Equity (GARE), and Shorewood community partners. Kairo has utilized the Shorewood’s Racial Equity Framework, the Six Conditions of Systems Change, and various GARE resources in creating the strategic plan. These resources are discussed in more detail in the Appendices. Shorewood’s Framework is based on Milwaukee County’s Racial Equity Framework which identifies these four key areas: Policy, Education, Awareness, Training. The Six Conditions of Systems Change describes the structural, relational, and transformative levels of change and the conditions that impact each level; providing a structured method to assess an organization through a racial lens.



But most importantly, this strategic plan is guided by the Shorewood Board of Trustees’ Equity Statement.

Kairo has worked to understand the environmental dynamics that impact the Village of Shorewood in order to facilitate development of a realistic, achievable plan to be implemented in incremental fashion over time. Effective implementation of this plan requires recognition of its value and its limitations. It can enrich Village government with diverse perspectives, break down the walls of inequity constructed by past actions, and enhance Village culture to benefit all.

But the plan will not resolve all equity issues; future work will need to be done by focusing on what lies within Shorewood's purview. Kairo acknowledges the breadth of issues regarding diversity, equity, and inclusion. However, the plan's focus is not intended to diminish the importance of other marginalized groups but rather provides a framework for addressing inequity in other areas including gender, sexual orientation, and persons with disabilities.

The plan establishes a blueprint for steady progress toward achieving diversity, equity, and inclusion. Kairo’s hope is that incremental does not morph into complacency and that resistance does not win over progress.

## Village's Racial Equity Work

During 2019 - 2021, the Village Board approved work with the YWCA's Unlearning Racism Program to provide EDI professional education. The Board contracted with Sam Coleman to provide leadership and direction to the Village's diversity, equity, and inclusion efforts. The Board also created the EDI committee comprised of Village Board members, management team, and representatives of the Human Relations Committee to facilitate Coleman's scope of work. During this time, Village leaders acknowledged that their work would resemble a marathon rather than a single initiative or race. One focus was to align priorities of legislative agenda(s), Village goals, department mission statements, core values and committee functions with equity, diversity, and inclusion priorities.

In 2022, Kairo Communications was hired to conduct an environmental scan and to develop a strategic plan in 2023. To initiate the environmental scan, the Kairo Communications project team used a mixed-methods approach. The team conducted interviews and/or conversations with almost fifty individuals including Board members, Village staff, school administrators, residents, students, entrepreneurs, and community activists. Our work included document review, data collection and analysis, historical research, literature review, identification of best practices, utilization of Government Alliance for Racial Equity (GARE) racial equity tools, review of consultant reports, review of media publications, and observations of committee meetings, and presentations at Village Board and staff meetings. All of these sources inform the development of the strategic plan.

Kairo employed this strategy to ensure a solid contextual understanding of the issues on which to create and implement a strategic plan. The historical research explained how Shorewood's past is inextricably linked to the broader metropolitan Milwaukee area of which it is a part. School segregation, redlining, racial restrictive covenants, employment disparities, and residential segregation extended from Milwaukee into Milwaukee County suburbs, creating barriers that have been maintained. Historical decisions, policies, and practices maintain inequity and exclusion.

These past decisions have shaped contemporary Shorewood so that the Village's current actions, whether intentionally or not, continue to perpetuate inequity and exclusion. For instance, in 2016 – 2022, the Shorewood community experienced several incidents that fueled division and increased awareness about racial issues.

The environmental scan provided an understanding of barriers: (a) the historical discriminatory dynamics that continue to impact the Village of Shorewood, (b) policies and procedures that perpetuate inequity, (c) community incidents that reflect a lack of understanding and/or respect for diverse communities, and (d) the bias and prejudice experienced by Shorewood residents of color. The development of a work plan gave Kairo additional insight that shaped the strategic plan and resource guide. The work plan is included as Appendix 4.

A strategic plan must be designed to diminish the existence and impact of bias, inequity, and exclusion and to embed alternative ways of operating. The mere elimination of an inequity leaves a void that must be filled in a positive manner, lest it be filled with an equally negative force.

While the past discriminatory actions in the region have impacted Shorewood, the Village continues to be an active partner with Milwaukee County and its suburbs to dismantle barriers that reinforce inequity and inclusion.

As such, the Village does not operate in isolation but is a part of a broader interdependent, interconnected ecosystem. The scan identified how Shorewood engaged in many educational, communication, and training initiatives. The Village partnered with the Shorewood Library Board, School Board, and others to host informational sessions, presentations, and training to increase citizen education, community awareness, and staff training.

As a result of the environmental scan and confirmed during development of the strategic plan, Kairo identified ten findings from the environmental scan:

1. The Board has not articulated a clear vision, mission, and expected outcomes for an effective diversity, equity, and inclusion agenda.
2. While the Village has provided significant education and training opportunities, a more strategic learning approach would be more impactful.
3. The current workplace lacks an inclusive culture which must be addressed before staff are motivated to focus on broader diversity, equity, and inclusion issues.
4. The Village lacks equitable internal operations, specifically in hiring, purchasing, and contracting processes.
5. The Police Department can improve relationships with communities of color by implementing the Police Organization Study recommendations and utilizing the expertise of department leadership<sup>1</sup>.
6. While the Village has a data management evaluation system, it must include data collection that can be used to enhance measurement of the strategic plan goals.
7. The Village must continue to address structural or systemic barriers, such as those that have persisted in housing, zoning, traffic, and development, which prohibit achievement of diversity, equity, or inclusion.
8. The Village has not collaborated with organizations and communities of color that have expertise regarding the diversity, equity, and inclusion issues the Village experiences.<sup>2</sup>
9. The Village can maximize its achievement of diversity, equity, and inclusion by participating with key partners, such as Milwaukee County and GARE.
10. The Village must adopt a commitment to a sense of urgency and accountability to move diversity, equity, and inclusion forward based on its organizational priorities.

In 2021, the Village of Shorewood's Board of Trustees adopted the Milwaukee County Racial Equity Framework which is provided in the appendices. In adopting the County framework, the Village Board noted that this is "a framework for organizing the work being done around diversity, equity, and inclusion in Shorewood and how it ties to the county-wide work being done by Milwaukee County." And indicated that "evaluating the Village's work around diversity, equity, and inclusion will inform the design of a consistent, five-year strategic plan that aims to ensure alignment and accountability when integrating diversity, equity, and inclusion actions across the organization.

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<sup>1</sup>. At time of publication, Shorewood Police Department has completed implementation of this study.

<sup>2</sup>. At time of publication, the Village of Shorewood has collaborated in an effort to make job postings more accessible to diverse candidates.

To facilitate transitioning into the strategic planning phase, Kairo identified these two goals:

1. Dismantle barriers that perpetuate marginalization, inequity, and exclusion.
2. Implement strategies that create a diverse, equitable and inclusive environment.

Kairo considered several fundamental issues in designing the strategic plan. A plan needs both an aspirational element and actionable elements that can be evaluated and measured over time. The need for expectation setting is important; establishing an overly ambitious plan that cannot be adequately supported by current staffing and resources dooms the plan to failure. However, establishing a plan with low expectations that can be achieved easily makes the plan ineffective and has minimum impact on diversity, equity, or inclusion. Issues of equity and inclusion are challenging and can make individuals uncomfortable, afraid to venture out of their comfort zones to make substantive impact. The effort to maintain a comfort zone can serve to maintain white privilege and further embed systemic barriers into the fabric of the organization.

### **Plan Development and Implementation**

Inevitably, organizations change. Whether in response to environmental forces, business opportunities, or constituent demands...organizations react, adapt, and evolve. Even those institutions that are resistant to change must change or risk becoming unproductive or irrelevant. In anticipation of or adjustment to change, organizations engage in strategic planning to set the organizational direction. This planning can strengthen the organization's ability to achieve outcomes that fulfill the mission.

Strategic planning can be difficult even in optimal situations. When organizations expand their strategic thinking to encompass issues of diversity, equity, and inclusion, the opportunities and challenges multiply. Organizational leadership, employees, and their constituents may not be prepared for the changes required. Achieving diversity, equity, and inclusion may seem doable, even generate support in the abstract...as an idea. But putting these principles into action may require the sharing of power and privilege.

Strategic planning without quality implementation is merely a waste of time, resources, and capital. Those who have organizational power and control lessen their ability to address equity issues if the focus is on working from within their comfort zone. The luxury of staying in this zone reflects privilege seldom afforded to marginalized communities and diminishes any sense of urgency to propel organizations into constructive action. Innovative problem solving may be required to address systemic barriers that maintain the status quo. Key components that support development and implementation of a quality strategic plan are:

1. Development of a vision and mission that serves as aspirational elements of the plan.
2. Development of realistic actionable items based on respect for organizational constraints but also moves the "equity needle" forward.
3. Creation of a framework for development of metrics to evaluate progress in achieving plan outcomes. Measuring progress provides an incentive for action and improvement.

4. Identification of tools, resources, and partners that can support the work. Eliminating exclusionary tactics requires a willingness to be more inclusive in addressing equity issues. Collaborating with those most impacted by inequity expands an organization's capacity. Failing to do so promotes exclusion.
5. Support for a climate of realistic risk tolerance and acceptance of the need to course correct when appropriate promotes formation of a learning community.

### **Shorewood Board Equity Statement**

To guide development of the strategic plan, the Village Board created an Equity Statement which reflects its vision, mission, and values regarding equity. The Equity Statement establishes the aspirational elements of the plan through its vision and mission. The statement sets expectations through its identification of how to operationalize its values.

## **VILLAGE OF SHOREWOOD BOARD OF TRUSTEES EQUITY STATEMENT**

### **VISION**

The Village of Shorewood is a safe, fair, and inclusive community where individuals are valued for their diverse experience, perspectives, and cultural backgrounds and afforded opportunities to fully participate in community life.

### **MISSION**

The Village of Shorewood fosters a culture that recognizes equity as essential to a fair and just society, promotes access to opportunities, ensures unbiased outcomes, and eliminates systemic barriers used to exclude historically marginalized groups.

### **PUTTING OUR VALUES INTO ACTION**

The values of the Village of Shorewood are operationalized through our commitment to:

1. Foster ongoing learning for residents and Village employees.
2. Implement actions that eradicate system barriers.
3. Utilize an equity lens to cultivate opportunities for equity and inclusion.
4. Maintain a culture of integrity, justice, and transparency.
5. Endorse community norms that demonstrate appreciation for diverse cultures.
6. Maximize teamwork, innovation, and evaluation to achieve positive goals.

The action plan below consists of goals, strategies, and actions that can be implemented to achieve the mission identified in the Board's Equity Statement.

As has been previously discussed, the plan has been developed with regard for Village priorities, constraints, and assets that impact plan implementation. The plan reflects the Six Conditions of Systems Change in that key components of the plan address structural, relational, and transformative issues. For instance, Goal One provides the structure for plan implementation and focuses on policies, practices, and resource flows. It is critical that leadership addresses

Goal One to set the foundation for implementation of the other five goals.

Goal Two addresses transformative issues. The transformative level is important because substantive change will not be sustained unless the mindsets of leadership and staff are open to plan implementation and have some regard for the importance of diversity, equity, and inclusion. Without a shift in the mindset of key actors, diversity, equity, and inclusion issues will not be adequately addressed and any outcomes achieved during plan implementation will not be sustained.

Goal Three focuses on ensuring that the workplace is grounded in equitable human resources practices that provide fair opportunities for increased, diverse participation in the human resource process. The goal acknowledges the importance of providing all employees with a sense of belonging and support for their efforts to expand their knowledge and understanding of diversity, equity, and inclusion.

Goals Four and Five addresses relational issues by engaging with Village partners, government entities, and diverse organizations. It is important that the Village not operate in an insular environment but engage with those most impacted by inequity and inclusion. This can generate the synergy gained through public – community partnerships and sets the stage for the sharing of power which is critical in achieving equity.

Goal Six ensures that the strategic plan promotes opportunities for the Village to demonstrate the impact of its commitment to diversity, equity, and inclusion on the community through delivery of quality services and strong community relations.

### **Strategic Action Plan**

**Goal One: Provide organizational leadership to structure implementation of strategic plan.**

**Strategy One:** Integrate Equity Statement framework into the work of the Board of Trustees.

**Actions:**

1. Analyze and update organizational policies and procedures using an equity-centered lens to mitigate potential adverse effects.
2. Require that a Diversity, Equity and Inclusion Impact Statement be included in all staff, committee, and consultant reports to Board.
3. Make ongoing commitment to engage residents that reflect diversity of community and increase diverse representation in Village appointments to commissions and committees.
4. Include Equity Statement framework into appointee training and require annual report from all Board committees regarding actions and outcomes that align with this framework.
5. Utilize diverse community experts to provide perspectives that add value to the work of the Board.

**Strategy Two:** Support Village administration’s use of structured process for plan implementation.

**Actions:**

1. In concert with the Village Board, the Village Manager establishes annual DEI goals for implementation based on organizational priorities, capacity, and investments.

2. Village Manager works with Village Board and department heads to establish metrics for all DEI implementation initiatives.
3. Initiatives are incorporated into department work plans.
4. Department heads provide semi-annual reports to Village Manger regarding successes, challenges, and resource needs for DEI goal achievement.
5. Conduct year end assessment of DEI related work plan achievements.
6. Acknowledge staff's work to achieve DEI work plan goals.

**Goal Two: Cultivate organizational commitment to values of DEI.**

**Strategy One:** Provide diverse array of activities to engage staff around learning, relationship-building, and resistance in relation to cultivating a diverse, equitable, and inclusive environment.

**Actions:**

1. Incorporate DEI training into Human Resources training plan.
2. Identify training that staff can engage in on an individual basis.
3. Engage in informal learning activities that promote opportunities for socialization among staff.

**Strategy Two:** Incorporate DEI strategic plan information and progress into existing communication channels and develop new channels where needed. Actions:

1. Leadership communicates support of and expectation of staff participation in DEI activities through internal communications and meeting agendas.
2. Ensure annual prioritization, planning, and budget documents reflect applicable DEI goals.
3. Establish and implement a schedule for sharing progress toward DEI goals in Village communications.
4. Develop a year-end summary of progress towards DEI goals and deliver to Village Board.

**Strategy Three:** Establish culture of accountability for plan implementation

**Actions:**

1. Develop self-assessment tool for staff, Village Board, and appointed volunteers to complete annually to support ongoing engagement with DEI objectives and plan implementation.
2. Track department utilization of all policies and practices that pertain to DEI outcomes.
3. Ensure that Village Manager reports to Village Board include effort and outcomes related to DEI goals.
4. As policies and code are updated, reflect DEI goals where applicable.

**Goal Three: Ensure Village of Shorewood has an equitable and inclusive human resources system.**

**Strategy One:** Ensure human resource system provides equitable employment opportunities.

**Actions:**

1. Implement DEI best practices for development of job descriptions, screening, interview, and selection processes.
2. Disseminate information regarding employment opportunities to diverse organizations.
3. Cultivate process to utilize expertise of representatives for diverse organizations in selection process.
4. Develop process to collect data regarding hiring process and employee demographics.

**Strategy Two:** Create a workplace environment that cultivates a sense of belonging and inclusion for all employees.

**Actions:**

1. Provide quality supervision and mentoring to ensure that all staff (and elected and appointed officials) can contribute to DEI outcomes.
2. Provide a foundation for effective plan implementation by incorporating staff readiness into the readiness assessment for each initiative.
3. Ensure a safe environment by de-stigmatizing the need for ongoing learning in relation to advancing equity, diversity and inclusion.
4. Ensure that staff have access to mentoring relationships that decrease resistance and isolation in relation to creating an inclusive workplace.

**Goal Four: Implement strategy to increase Supplier Diversity in Village operations.**

**Strategy One:** Create process to promote participation of certified disadvantaged, minority, and women owned businesses (D/M/WBEs) in Village contracting opportunities.

**Actions:**

1. Develop department procedures to implement Board minority owned businesses utilization policy in Public Works department.
2. Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.
3. Set expectations for prime contractors to utilize certified businesses in contract work when appropriate.
4. Track department utilization of certified businesses.

**Strategy Two:** Create process to promote participation of certified disadvantaged, minority and women owned businesses (D/M/WBEs) in Village procurement process.

**Actions:**

1. Implement process to increase utilization of certified businesses in Village's decentralized purchasing system.
2. Engage with government entities that utilize certified businesses in the purchase of goods and

services to learn about their applicable procurement processes.

3. Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.
4. Engage with diverse professional organizations to disseminate information to certified businesses regarding Village contracting and procurement opportunities.

**Goal Five: Create and sustain Community Network to support Village achievement of DEI outcomes.**

**Strategy One: Utilize existing community partners to achieve DEI goals.**

**Actions:**

1. Coordinate with Shorewood Library Board to operationalize its Equity Statement to reflect DEI objectives.
2. Build connection with Shorewood School District to leverage their racial equity work to benefit Village government.
3. Collaborate with Shorewood BID to increase marketplace opportunities for minority owned businesses.
4. Collaborate with Shorewood Today to inform residents, staff, and partners about Village of Shorewood commitment to and achievement of DEI goals.

**Strategy Two: Maintain intergovernmental cooperation on equity, diversity, and inclusion issues.**

**Actions:**

1. Maintain partnership with Milwaukee County to collaborate and share resources.
2. Participate in County Intergovernmental Cooperation Council and its Racial Equity and Inclusion Committee.
3. Expand relationships with other Milwaukee County municipalities to enhance and promote DEI efforts.

**Strategy Three: Create Partnerships with diverse organizations and communities.**

**Actions:**

1. Create a network of organizations to disseminate information to diverse communities.
2. Cultivate relationships with organizations for professionals to serve on interview panels.
3. Promote awareness and participation in annual events that recognize and pertain to equity, diversity, and inclusion.

**Goal Six: Ensure Village of Shorewood services demonstrate Village’s commitment to diversity, equity, and inclusion.**

**Strategy One:** Reflect the Board’s Equity Statement in the Village’s work in the community.

**Actions:**

1. Implement community outreach to diverse communities to strengthen police/community relations.
2. Improve communication and engagement with residents who rent their homes.
3. Consider the accessibility of Village government and operations for people who may need assistance to participate.
4. Continue to expand the number of residents who subscribe to the Village communications.
5. Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.
6. Increase participation of diverse groups and individuals through direct engagement and community surveys.

**Conclusion**

Kairo Communications has developed this strategic plan based on an environmental scan, input from Village leadership and staff, and understanding the internal and external dynamics impacting the Village of Shorewood government. The plan reflects the areas where Village government can significantly impact the level of diversity, equity, and inclusion in its internal operations, connect with diverse communities, and impact the residents of Shorewood as well.

The plan is designed to be implemented over a five-year period which allows for leadership to modify the pace and focus at any given time. Possible key performance indicators and metrics that can be used to provide guidance in measuring achievement of the goals are identified in the Resource Guide provided with this plan. Leaders and staff engaged in plan implementation best understand the issues, the challenges and opportunities associated with plan implementation and can develop realistic, achievable indicators and metrics.

Implementing the plan can improve policies and practices, build strong partnerships, and increase diversity in meaningful and impactful ways. But these goals can only be achieved if the Village demonstrates the commitment to do so. Kairo thinks it will. Time will tell.

# Equity Diversity & Inclusion Framework

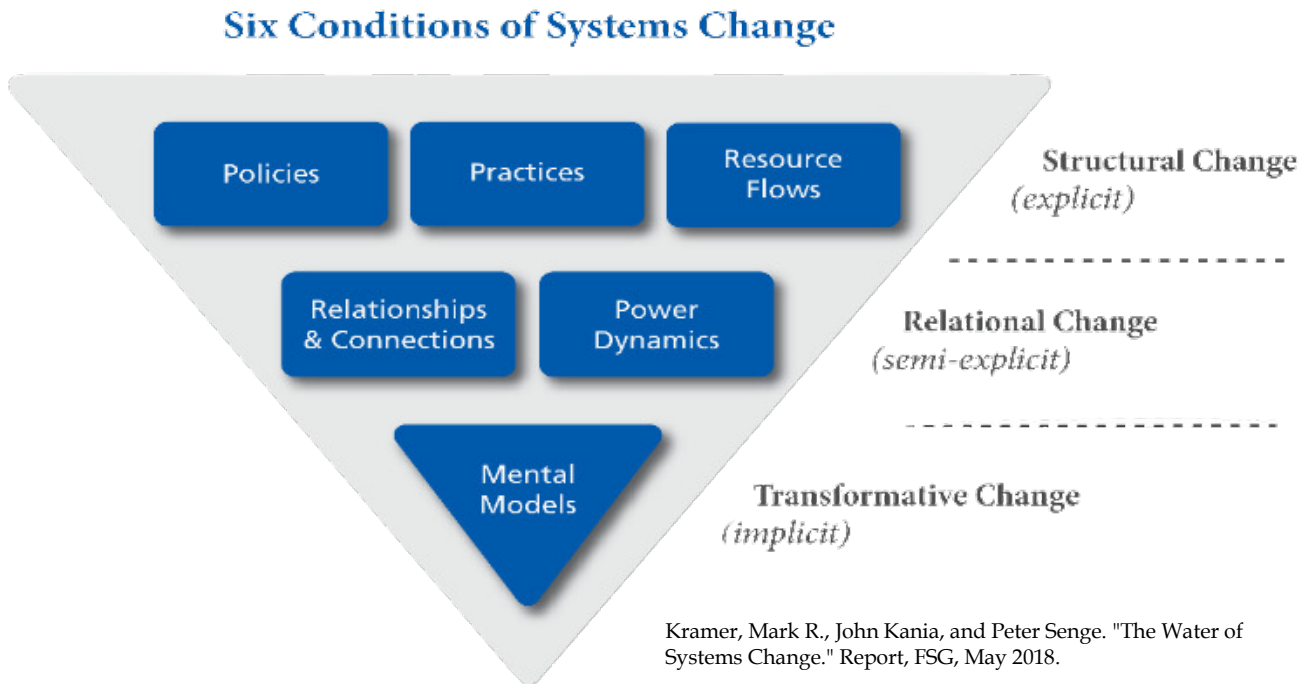


(First appeared in the Equity Update section in the Shorewood Today Fall 2021 Issue.)

## LEVELS OF SYSTEMS CHANGE

### Utilization of a Racial Equity Lens Framework: Six Conditions of Systems Change

Kairo presents the Six Conditions of Systems Change, a framework that reflects its use of a racial equity lens. The six conditions are incorporated into three levels of systems change: structural, relational, and transformative as illustrated below.



Effective integration of strategic planning and implementation does not happen by chance especially when focused on systems change driven by the commitment to the infusion of diversity, equity, and inclusion in the organization. The systems change approach is designed to shift conditions that hold a problem in place.

An organization must identify the factors that hold the problem in place and develop a strategy to remove the constraints that support the continuance of these conditions. Changes in the organization's structure, relations, and mental modes are required.

## Structural Change

Structural Change is impacted by three critical organizational structures: policies, practices, and resource allocation.



**Policies:** Government, institutional, and organizational rules, regulations, and priorities that guide the entity's own and others' actions.



**Practices:** Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines, or informal shared habits that comprise their work.



**Resource Flows:** How money, people, knowledge, information, and other assets such as infrastructure are allocated and distributed.

Structural changes are considered explicit because they can be observed and identified, can be evaluated and measured using traditional methods. However, leaders and staff do not always understand how policies and practices promote inequity or how resources are unfairly distributed.

## Relational Change

Relational change demonstrates how an organization can eliminate damaging relationships, power dynamics, and embed equitable ones into its culture through collaborations across sectors and communities.



### Relationships & Connections:

Government, institutional, and organizational rules, regulations, and priorities that guide the entity's own and others' actions.



**Power Dynamics:** Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines, or informal shared habits that comprise their work.

In the past, organizations have operated in insular environments which lack a foundation on which to understand the value and assets of diverse individuals and communities. Individuals impacted most by inequity, exclusions and marginalization have had to be system aware and to understand organizational and societal relationships and dynamics to engage with, advance in, or survive the impact of the environment in their lives and community.

While an organization can use its relational resources to perpetuate inequity, utilizing the experiences and insight of marginalized individuals can increase an organization's understanding of how past decisions and actions have been ill-informed, poorly implemented resulting in unintended, negative consequences.

## Transformative Change

Transformative change focuses on implicit factors that can significantly impact an organization, but operate undetected, invisible in systems with profound, long-term effect.



**Mental Modes:** The habits of thought—deeply held beliefs and assumptions and taken-for-granted ways of operating that influence how we think, what we do, and what we value.

The mental modes are the frameworks and worldviews that individuals use to under the world and are the forces that drive the actions in most systems and can deter an organization's ability to achieve goals, including diversity, equity, and inclusion.

A person's beliefs, biases, and ideologies form a narrative about individuals, races, groups which is embedded into a society's belief system and used to justify and validate actions of injustice, inequity, exclusion, and segregation. Mental modes in an organization can be the foundation on which resistance to change is created, maintained, and protected.

APPENDIX 3

The Village of Shorewood

# Diversity, Equity, and Inclusion

ENVIRONMENTAL SCAN



Prepared by  
Kairo Communications LLP  
February 20, 2023

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# Acknowledgments

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## Executive Summary

Kairo Communications conducted an environmental scan, a process used to collect and analyze data that is relevant to the Village of Shorewood's efforts to address issues of diversity, equity, and inclusion, terms used to describe policies and programs that promote the representation and participation of different groups of individuals, of different ages, races and ethnicities, abilities and disabilities, genders, religions, cultures and sexual orientations. Diversity is viewed as the characteristics that define individuals and groups that make them different from others. Equity focuses on fair treatment that provides access, opportunity, and advancement for all people. Equity is the application of fair policy, practices and processes so that one's identity does not predict the outcomes of one's life. Inclusion focuses on having a voice; having one's ideas respected; having a sense of belonging in the environment individuals participate in.

The scan starts with a broad review of the metropolitan Milwaukee environment and narrows to a more concentrated focus on the Village of Shorewood government. Kairo employs this strategy to ensure a solid contextual understanding of the issues on which to create and implement a strategic plan. The scan acknowledges how government historically worked to create and perpetuate inequities and disparities and how the Village of Shorewood operates within an ecosystem, metropolitan Milwaukee that can impede and/or support efforts to dismantle barriers.

The Kairo Communications project team acknowledges the breadth of issues regarding diversity, equity, and inclusion. There are many aspects to diversity, equity, and inclusion. Our focus on racial equity and the use of examples of experiences specifically of African Americans is intended to provide a brief, clear, specific review of history and to identify how past inequities have impacted the Village. However, this focus is not intended to diminish the importance of other marginalized groups or inequities regarding race/ethnicity, gender, sexual orientation, and persons with disabilities. During the creation of a strategic plan, attention will be given to addressing a broader scope of diversity, equity, and inclusion.

The Kairo Communications project team used a mixed-methods approach. The team conducted interviews and/or conversations with almost fifty individuals including Board members, Village staff, school administrators, residents, students, entrepreneurs, and community activists. Our work included document review, data collection and analysis, historical research, literature review, utilization of Government Alliance for Racial Equity (GARE) racial equity tools, review of consultant reports, review of media publications, and observations of committee meetings, and presentations at Village Board and staff meetings.

The GARE tools and resources including its Model of the Theory of Change and information about the work of other municipalities were valuable resources. We also reviewed the excellent racial equity work of Milwaukee County and the tools the county uses to generate strategies, documents, and community-buy-in.

### **The mixed method approach enabled Kairo to collect information that answers these five fundamental questions the environmental scan:**

1. *How did we get here?*
2. *Where are we?*
3. *What have we done currently?*
4. *Where do we want to go?*
5. *How do we move forward?*

**As a result of the scan, the team identified 10 findings which drove our identification of two goals and four essential strategies for inclusion in a strategic plan. The findings are:**

- 1.** The Board has not articulated a clear vision, mission, and expected outcomes for an effective diversity, equity, and inclusion agenda.
- 2.** While the Village has provided significant education and training opportunities, a more strategic learning approach would be more impactful.
- 3.** The current workplace lacks an inclusive culture which must be addressed before staff are motivated to focus on broader diversity, equity, and inclusion issues.
- 4.** The Village lacks equitable internal operations, specifically in hiring, purchasing, and contracting processes.
- 5.** The Police Department can improve relationships with communities of color by implementing the Police Organization Study recommendations and utilizing the expertise.
- 6.** The Village lacks a data management and evaluation system hampering its ability to analyze diversity, equity, and inclusion metrics.
- 7.** The Village must continue to address structural or systemic barriers, such as those that have persisted in housing, zoning, traffic, and development, that prohibit achievement of diversity, equity, or inclusion.
- 8.** The Village has not utilized the expertise of organizations and communities of color that have expertise regarding the diversity, equity, and inclusion issues the Village experiences.
- 9.** The Village can maximize its achievement of diversity, equity, and inclusion by participating with key partners, such as, Milwaukee County.
- 10.** The Village must adopt a commitment to a sense of urgency and accountability to move diversity, equity, and inclusion forward.

**To facilitate transitioning into the strategic planning phase, the team identified two goals and four essential strategies. The goals are:**

- 1.** Dismantle barriers that perpetuate marginalization, inequity, and exclusion.
- 2.** Implement strategies that create a diverse, equitable and inclusive environment.

Dismantling barriers that perpetuate inequity requires an intentional approach with concrete, realistic steps. This environmental scan provides an understanding of barriers: a) the historical discriminatory dynamics that continue to impact the Village of Shorewood, b) policies and procedure that perpetuate inequity, (3) community incidents that reflect a lack of understanding and/or respect for diverse communities, and (4) the bias and prejudice experience by Shorewood residents of color.

To create an equitable and inclusive culture, implementation of innovative strategies is critical. This scan identifies the positive steps the Village has taken, but also identifies that a strategic adjustment, a refocusing of efforts is necessary. This requires intentional work, the establishment of partnerships with marginalized communities, and a willingness to evaluate the work and be accountable. But most of all, it requires a commitment to do the hard work for the long term.

To facilitate change, four essential strategies: (1) Design Strategy Approach, (2) Optimize Internal Operations, (3) Create Inclusive Community, and (4) Invest in Sustainability are recommended for the strategic plan.

This report reflects the work invested in producing a quality environmental scan; its purpose is to lay the foundation for the development of a strategic plan. Its goal is to facilitate a process that culminates in the Village achieving greater diversity, equity, and inclusion.



These actions codified racial segregation in Shorewood, impacting racial wealth gaps, and patterns of racial and housing segregation today. Redlining and racial covenants which were instituted to deny ownership to specific groups based on race and fueled by prejudice had a far-ranging impact. These restrictions confined people of color to highly segregated neighborhoods that received little services or resources from government. Further, these government sanctioned actions destroyed the ability of many people of color to purchase homes, improve their housing options, or generate wealth through home ownership. This inability to invest in quality housing, to secure stability for their families through home ownership, and to achieve economic prosperity through housing equity and wealth associated with suburban homeownership are the long-term outcomes of redlining and racial covenants.

While the U.S. Supreme Court in 1948 ruled in *Shelley v. Kraemer* that federal and state courts could no longer endorse such covenants, the Wisconsin legislature did not repeal the state statute which permitted racial covenants until three years later. Thus, racially restrictive covenants prohibiting the sale of homes to non-whites in many Milwaukee neighborhoods and suburbs continued into the 1950s. Afterwards, local governments instituted zoning ordinances and other new discriminatory practices to continue perpetuation of residential segregation. Many of these laws in Milwaukee, Shorewood, and other communities were not invalidated until 1972 by the U.S. Court of Appeals as a violation of the 1968 Fair Housing Law. In 1967, the Village of Shorewood adopted an ordinance relating to equal opportunities in housing which was amended and included in the Village Code as Chapter 283 Fair Housing. In 1980, the Village also adopted Policy No. 13 Fair Housing. As a result of the past discriminatory actions reinforced over decades, the Milwaukee metro area, including Shorewood, earned the label of being “hyper-segregated”. A USA Today study based on the 1990 Census ranked metro Milwaukee as the seventh most segregated of more than 200 metropolitan areas.

Residential segregation worked in tandem with confinement of Black students to inner city schools.

In the 1950s, the Milwaukee Public School Board used a variety of techniques including intact busing, transfer policies, new building construction in white neighborhoods, and changes in school boundaries to intentionally exclude Blacks from attending predominantly white schools. Board member Lorraine Radtke conveyed the underlying prejudice stating that inner-city children “can’t understand our plumbing. You have urination in water bubblers.”

In 1965, during Radtke’s tenure as Board president parents of Black and White children sued the district. In 1976, Federal Judge John W. Reynolds ruled in favor of the parents indicating that the segregation had been intentionally created and maintained by the Milwaukee School Board. A Shorewood Herald 2/5/1976 editorial indicated that “residential segregation, lest any of us forget, is at the heart of the school desegregation problem, now undergoing intensive analysis as the result of Federal Judge John Reynold’s recent desegregation order. Except for segregated housing there would be no segregated schools.”

Employment discrimination has also been a persistent issue that impacts residential segregation. Historically people of color have been relegated to the dirtiest, most physically demanding, lowest paying jobs; the last hired, first fired. For example, African Americans have consistently experience high unemployment in the metro Milwaukee area. In the study, *The State of Black Milwaukee*, Marc Leving found that “In 1970, 85% of Black males (of prime working age, between 25 – 54) were employed. That figure dropped to 66% in 2016 – 2018, the third-lowest rate among large metros. In 1990, Milwaukee had the greatest gap between Black and white unemployment rates of any metropolitan area. In 2016 – 2018, the disparity between Black and white male employment was second only to Buffalo.”

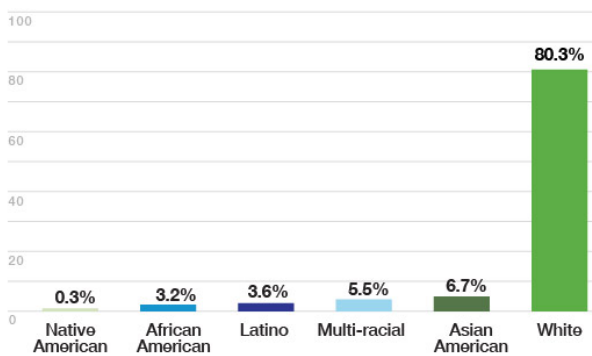
Decades of discrimination wreaked havoc on the lives of generations of African Americans. Levine also found that of the 50 largest metro areas in the country, Milwaukee had the lowest Black median family income, the second lowest Black homeownership rate, the highest Black male incarceration rate, and the highest Black poverty rate.

# The Impact of the Past on Contemporary Shorewood

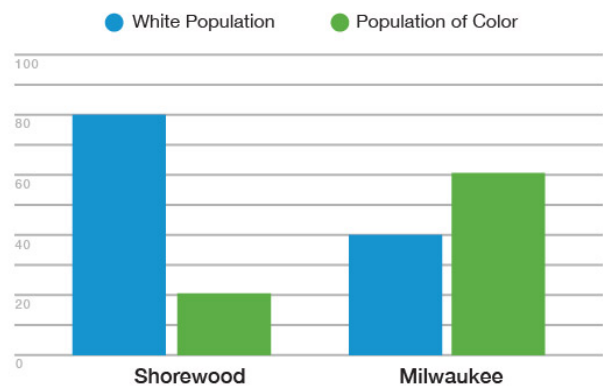
On the surface, there is little evidence of how housing, school, and employment discrimination in metro Milwaukee impacted the Village of Shorewood. The Village covers approximately 1.6 square miles and is Wisconsin’s most densely populated community. It is a walkable, bike-friendly, and architecturally diverse community with a school district recognized for excellence and a viable business district. Shorewood is located near Lake Michigan and adjacent to the city of Milwaukee and the University of Wisconsin – Milwaukee. It ranks highly in Wisconsin regarding quality of housing, education, lake shore property, and other key indicators of an affluent, prosperous community.

However, past policies and practices have shaped the current Shorewood environment, resulting in a lack of diversity, equity, and inclusion. Milwaukee is consistently ranked as one of the most racially segregated cities in the country; Shorewood is located in a metropolitan area having the lowest rate of Black suburbanization in the nation. While about 10% of Black households live in metro Milwaukee’s suburbs, over 80% of white households live in the suburbs. About 80% of the population in Shorewood is comprised of White residents compared to 20% residents of color. Conversely, 60% of the population in Milwaukee is comprised of people of color compared to 40% White residents. The general breakdown is shown in the chart below.

**Percent of Race**



**Comparison of Racial Populations: Shorewood and Milwaukee**

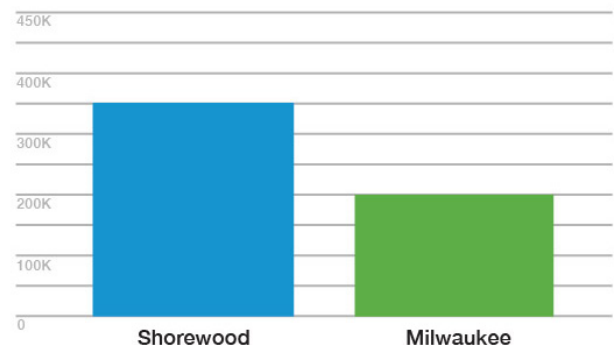


What makes Shorewood a prosperous community can also serve as a barrier to addressing issues of diversity, equity, and inclusion. There is a high cost of entry for a family wanting to relocate to Shorewood. This cost includes housing cost, or rent cost, property tax, childcare and after school cost. Based on Census data, the median household income in Shorewood was \$81,016 between 2017 - 2021. Monthly mortgage and related housing costs were approximately \$2,500, and median gross rent was \$1,054. For some families the cost for a four-year old to attend after school care to supplement half day K-4 is almost \$3,500 annually.

The past discriminatory actions have impacted the housing stock and home cost in Milwaukee and Shorewood in very different ways. The chart below illustrates the significant difference in the Shorewood’s median home cost of \$357,000 compared to Milwaukee’s median home cost of \$135,600.

This data suggests that Shorewood must be intentional in its equity efforts. Many individuals wanting to relocate from Milwaukee to Shorewood may find the cost of housing and the additional cost of entry too great. Many individuals, including Village staff, have indicated that they cannot afford to move to Shorewood.

**Comparison of Median Home Cost: Shorewood and Milwaukee**



# Shorewood 2020 Demographics

## Population Density

13,248 per  
1.6 sq. mi.



## Median Age

38.6



55% Female

**\$75,779** Median  
Household  
income



**\$54,522** per  
capita income

12.1% of residents are  
Below poverty level

12.1% Persons  
11% Children  
13% Seniors (65+)



Travel time to work



22.4  
mins

**6,180** Households  
**6,448** Housing units  
**2.1** persons  
per household



**96%** occupied  
**52%** renter occupied

**58%** of  
units are  
multi unit



**352,600** median  
value of owner  
occupied units



**17.2%**  
Annual migration



**60%** of households  
are married couples

**76.3%**  
bachelors  
degree  
or higher



**98.9%** high school  
grads or higher



**82%** speak only  
English at home

**14.9%**  
are  
foreign  
born



**55%** of foreign  
born are Asian



**4%** are veterans

## Current Evidence of Racialized Issues

While Shorewood has a reputation of being a progressive community, it continues to wrestle with issues of diversity, equity, and inclusion which are demonstrated in two ways: (1) incidents that fueled racialized debate/division and (2) situations experienced by people of color that demonstrate how inequity is actualized.

First, Shorewood has experienced incidents over the last several years that have divided the community. As during the Civil Rights movement of the 1950 – 60s, youth have often initiated conversation or protest in response to their perception of injustice. Also, as history has shown, issues regarding youth of color attending integrated schools can evoke polarizing responses. Thus, the Shorewood School District has had a pivotal role in the incidents identified below even as it has worked to increase equity in its environment. It would be easy, convenient to simply characterize the events as isolated incidents, label them as “school” issues instead of recognizing that they reflect the community and its residents.

### Incidents that fueled Racialized Debate/Division

- 2016** – The School District painted over the mural depicting how Black and Brown students felt.
- 2018** – Division regarding the play *To Kill a Mockingbird*
- 2019** – Suspension of gym teacher
- 2020** – Murder of George Floyd
- 2020** – Protests in Shorewood in response to the murder of George Floyd
- 2020** – Resident spitting on protesters
- 2020** – Curfew set by former Village Board president
- 2022** – Text messages sent by four Black Shorewood School District staff
- 2022** – Termination of Shorewood School District IT Director

Some of these incidents sparked significant discussion, political change, media coverage, and community participation. These incidents also highlighted contrasting opinions on issues of race and a level of polarization in the community. A school Board member indicated that the controversy regarding the play *To Kill a Mockingbird* and its subsequent cancellation was a lost opportunity, that a public conversation about the issue could have been valuable for the community and increased understanding of different perspectives.

In 2020, the action of the Village Board president was a turning point for Village government and sparked significant changes in Board leadership and composition which increased Board interest in addressing diversity, equity, and inclusion issues and opportunities.

Second, some residents of color have expressed concerns regarding the level of implicit and explicit bias as well as personal and institutional racism they have experienced in Shorewood. In fairness, Shorewood residents of color have expressed positive and negative perspectives regarding their experiences living in Shorewood. The voices of residents of color have been represented in the Shorewood Today Magazine, in fact the Fall 2020 was the Issue of Racial Inequity. Underrepresented voices have also been included in Community Development Authority and Human Resources Commission meetings, in community meetings led by Shorewood Moving Forward and the Shorewood Solidarity Network, and in interviews with the Kairo Communications project team. The examples below illustrate how people of color experience implicit and explicit bias conveyed, at times, through micro and macro aggressions.

<b>Perspectives of People of Color regarding Racialized Experiences</b>	
<b>Types of Experiences</b>	<b>Quotes of People of Color</b>
<b>Implicit Bias</b>	<i>“Oh, you own your own house? You’re not renting?’ It’s not a multi-family building, it’s just a house. Why would you ask me that? Is that a normal question?”</i>
<b>Explicit Bias</b>	<i>“When we first moved to Shorewood in 2001, I felt a lot of hostility. I thought we’d made a mistake moving here, but I do think things have improved since then.”</i>
<b>Inclusion</b>	<i>“My heart goes out to the younger generation when I hear some of the same stories repeated – things that I lived through many years ago – about the discomfort they feel in the community and the feeling that they are not welcome. “</i>
<b>Stereotyping</b>	<i>A dark complexion tall black man entered an elevator at the location of his new job. The lady in the elevator was concerned, telling the Black man, “Don’t get on. I’m afraid of you.”</i>
<b>Missionary Complex</b>	<i>“I had a lady tell me, ‘the Blacks don’t know what they need,’ and ‘we have to help the Blacks.’”</i>
<b>Criminalization</b>	<i>“The problem is that the police get called for everything, even when there is no real criminal act. So often our society criminalizes those we view as mentally ill or poor, and the police are used as the weapon to eradicate them from our view.”</i>
<b>Racial Profiling</b>	<i>“What saved me from arrest is that I had my receipts. The first time I was stopped by security, the white customer who tripped the alarm wasn’t stopped. The next time, another Black woman and I were stopped. We both had our receipts. When a White woman was stopped, she wasn’t asked to show her receipt. Six months later, I’m still not comfortable going to this store four blocks from my home.”</i>

## The Metro Milwaukee Ecosystem

While the past discriminatory actions in the ecosystem have impacted Shorewood, the Village continues to be an active partner with Milwaukee County and its suburbs to dismantle barriers that reinforce inequity and inclusion. As such, the Village does not operate in isolation but is a part of a broader interdependent, interconnected ecosystem as evidenced by the following:

- 1.** Shorewood is a strong partner with Milwaukee County. Village Board President Ann McKaig leads the Intergovernmental Cooperation Council's (ICC) Racial Equity Committee and participates on the County's Dismantling Racism and Barriers Group. The Village adopted Milwaukee County's Racial Equity Framework to work in concert with rather than siloed away from the County and its suburbs. The County has implemented many actions led by the County Executive, the Office of Equity, other departments, and stakeholders to dismantle barriers to equity.
  - a.** In May 2019, Milwaukee County passed a first-of-its kind resolution declaring racism a public health crisis.
  - b.** In April 2020, Milwaukee County passed an Ordinance to advance racial equity and improve health outcomes. County leadership stated that "By achieving racial equity, Milwaukee will be the healthiest county in Wisconsin." The County identified Wisconsin "as ranking at or near the bottom of the nation for racial disparity in unemployment, poverty, infant mortality, incarceration, school disparity, school suspensions, high school graduates, college attendance and graduations, and economic mobility."
  - c.** Milwaukee County leadership committed to eliminating institutional racism by addressing County policies, practices, and power structures through a racial equity lens.
  - d.** Milwaukee County utilizes several tools including a Strategy Dashboard, a performance measure tool, and a Health & Equity Framework designed to address the root causes of racial inequities.
- 2.** Shorewood is a partner in the North Shore Fire Department and the North Shore Health Department with Bayside, Brown Deer, Fox Point, Glendale, River Hills, and Whitefish Bay. Several of its partners in these collaborations have also taken steps to promote diversity, equity, and inclusion.
  - a.** The Village of Brown Deer adopted a Proclamation of Racial Equity on June 1, 2020.
  - b.** The School District of Brown Deer approved an Equity Plan "spurred by the marginalization of our Brown Deer scholar athletes when white football players from another school used the "N" word directed at our quarterback and other students of color." The Equity Plan contained an Equity in Excellence Policy adopted in August 2020.
  - c.** The Village of Whitefish Bay Board approved a Racial Equity Statement in July 2020. The Board passed Resolution 3125 in support of the "Mapping Prejudice & Racism in Milwaukee County" Project which documents restrictive covenants.
  - d.** The Whitefish Bay School District included racial equity as a core construct of values in its District Focus Plans. The School District sent a letter to parents in which it stated that the tragic deaths of "Ahmaud Arbery, George Floyd, and Breonna Taylor and many others have brought our cultures to a flash point over systemic racism in our society.

- e. The City of Glendale issued a Diversity, Equity, and Inclusion Statement. One of the five core priorities of Glendale’s 2040 Comprehensive Master Plan conducted by Vandewalle & Associates in 2022 was to promote inclusion, diversity, and high quality of life.
  - f. In 2022, the Glendale – River Hills School Board passed a resolution to celebrate June every year as Lesbian, Gay , Bisexual, Transgender and Queer (LGBTQ) Pride Month.
- 3.** The Shorewood School District implemented a Strategic Plan that focuses on “excellence, growth, and equity” and contracted for diversity training with Integrated Comprehensive Systems for Equity. A study “Experiences of African American Students in Shorewood School District” conducted by Cheyenne Cole and the research of Joan Blakely and Gary Williams focused on the challenges faced by students but is applicable to challenges faced by other marginalized groups Joan Blakely and Gary Williams “Race an Equity in Shorewood School” focused on the challenges faced by students, families, and teachers. The research discussed the importance of relational trust and is applicable to challenges faced by other marginalized groups.
- 4.** Shorewood community organizations include those who work regularly with the Village – the BID, Shorewood Today Magazine, Shorewood Historical Society, Shorewood Foundation, and Shorewood Connects. Some of these organizations receive Village funding, have Trustees on their Boards, and/or partner with the Village Board on mutually beneficial efforts.
- 5.** Shorewood has conscientious residents who participate in community events, forums, and organizations. Some resident organizations, such as, Shorewood Moving Forward and the Shorewood Solidarity Network, have supported, opposed, and/or proposed solutions counter to proposed Village policies. Regardless of residents’ positions on issues, it is critical that diverse voices are heard. Open dialogue can facilitate community understanding of and support for the Village’s diversity, equity, and inclusion strategic plan. Quality community/government relations can promote equity and inclusion.

Recognizing its unique and valuable role in the ecosystem, the Village can utilize an effective systemic approach to addressing racial equity which promotes working across silos to achieve a more comprehensive impact.

# The Village of Shorewood Government

While the Village of Shorewood denotes the Village Board, Trustee Board, administration, and operations, it represents the Shorewood community which has strengths and challenges. The Kairo team conducted a SWOT Analysis to identify the strengths, weaknesses, opportunities, and threats, Shorewood faces, many of which are elements that the Village government embraces and seeks to enhance or considers detrimental to the long-term vitality of the community and seeks to suppress.

## SWOT ANALYSIS



### Strengths

- Wealthy Community
- Quality Schools
- Quality Housing Stock
- Walkability of Village
- Intergenerational Community
- High level of Citizen Involvement
- Significant level of public services
- Financial Stability of Government
- Qualified Workforce
- DEI Training of School/ Village staff
- DEI community education through departments and committees



### Weaknesses

- High Cost of Entry
- Past Racial Incidents
- History of Housing Discrimination
- Dense Area – No Expansion Capacity
- Declining School Enrollment
- Workforce Capacity
- Current Workforce Issues
- Racial Profiling
- Resident concerns about equity initiative in school district



### Opportunities

- Strong Intergovernmental Partnerships
- Strong reputation as progressive community
- Intergovernmental Racial Equity Committee
- Significant Partner with Milwaukee County
- Partnership with YMCA Unlearning Racism

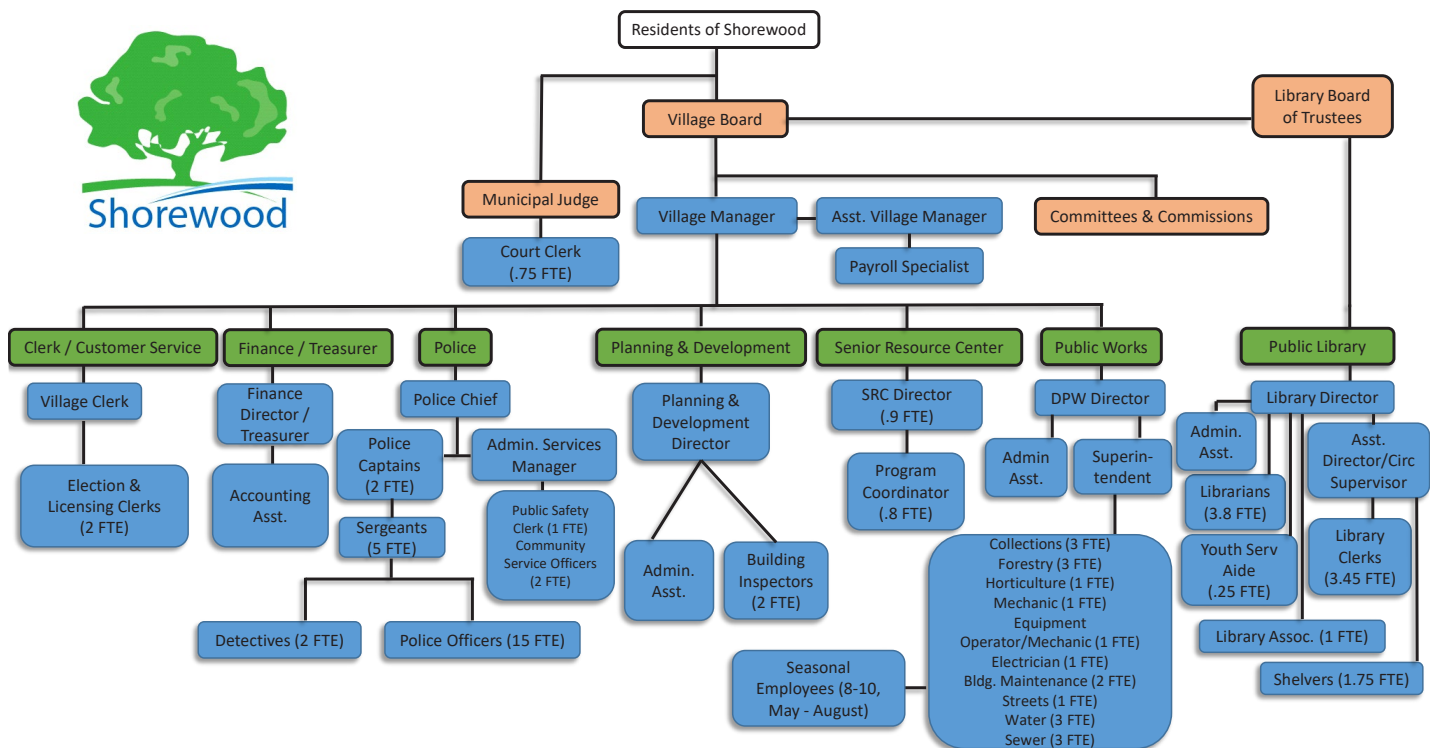


### Threats

- Polarized Society
- Increase in Hate Speech
- Perception of increase in crime
- Perpetuation of Historical Inequity

The Village government system includes a seven-member Board of Trustees, a Village Manager, and administrative departments that employ residents of seven counties, and active participation of residents on numerous committees. The government also includes the Library Board of Trustees and its staff. The organization chart below illustrates Shorewood government. The Village of Shorewood is a governmental entity that has a purview over the structures and experiences within its statutory power: policy that the Village has control over, and people employed by the Village. Much of what Village government is charged with is controlled by other levels of government.

The Village government structure that this report focuses on is the Village Board of Trustees, the Library Board of Trustees, and their staff as the chart below illustrates.



## An Overview of the Village's Racial Equity Work

The commitment of Shorewood to address issues of diversity, equity, and inclusion is reflected in the many educational, communication, and training initiatives that the Village Board, Library Board, School Board, and others have undertaken over the last few years. These entities and their citizen committees have hosted informational sessions, presentations, and trainings to increase citizen education, community awareness, and staff trainings. The Village Board adopted Milwaukee County's Racial Equity framework contained in Appendix A which focuses on education, awareness, training, and policy. Below is a listing of the activities, the Village Board has supported in these areas.

Quality educational series and events, focusing on critical issues of affordable housing and other diversity, equity, and inclusion related issues have been sponsored by the Community Development Authority, the Library, Senior Resource Centers, and the Human Relations Commission. Many of these educational opportunities have engaged community residents.

**EDUCATION:** A commitment to learning- both individually and as a community – about the lived experiences of people of color. Several entities, often working in partnership, were very involved in providing education regarding diversity, equity, and inclusion. For instance, the Community Development, Public Library, Senior Resource Center often co-sponsored educational events.

- Community Development A: seven-part series on the Role of Suburbs Creating a Diverse and Inclusive Region: Spotlight on Housing
- Human Relations Commission created a Social Justice Repository
- Human Relations Commission hosted Shorewood Speaks video series.
- Shorewood Public Library community educational events (2016 – 2022)
- Government Alliance for Racial Equity Training

The Village Board of Trustees passed several resolutions, ordinances, and policies and commissioned several studies and plans that addressed diversity, equity, and inclusion issues

**POLICY:** Ensuring all decision making is rooted in creating and nurturing an inclusive community.

- Resolution 2021 – 24: A Resolution Adopting a Framework for the Village of Shorewood to Achieve Racial Equity within Milwaukee County.
- Resolution 2022-12: Repudiating the History of Discriminatory Covenants in Milwaukee County Ordinance
- Land Acknowledgment
- Ordinance 3001 – Creating Section 319-12: Prohibit the Practice of Conversion Therapy
- Proclamation of Recognition of Juneteenth Day HRC 6/21; Library 10/22
- Policy No. 21: Purchasing and Accounts Payable
- Policy No. 40: Tax Increment District (TID) creation & Tax Increment Financing (TIF) assistance; Section 5: Hiring and Contracting for TIF Funded Projects Goals
- Shorewood Comprehensive Plan 2040
- Commercial Zoning Plan
- Shorewood Police Department Organization Study
- Revised Parking Ordinances
- Shorewood Police: Pursuit Policy
- Village Board Justice and Dignity Resolution

Some of the issues identified above have served as catalyst for change, motivation for the Village. The Village staff have also communicated information to keep the community aware of the work being done and to provide opportunity for citizen input.

**AWARENESS:** Communicating what the Village is doing to tackle issues of EDI.

- Village Manager's EDI Update to the Board
- Village Department Open Houses to obtain community feedback on major initiatives.
- Village Surveys and Comment Forms
- Public Participation Plans for Key Village Studies

Staff trainings have been provided to staff with mixed results. For instance, many participants on the Equity, Diversity, and Inclusion (EDI) Committee led in 2021 by Sam Coleman, former Director of Curriculum and Instruction for the Shorewood School District, indicated that the committee was ineffective. A review of documents used in the EDI committee showed that Coleman had clear goals, a clear set of information, a strategic focus, and identified action steps. However, the perceptions of participants regarding their experiences on the EDI committee differed from Mr. Coleman's in part due to differing learning styles, a preference for a different type of learning process, and a different view of the importance of the effort. Many of EDI committee participants did not feel there were clear expectations about their participation on the committee, did not view the committee as a safe place for conversation, and felt frustrated and uncomfortable with the process.

**TRAINING:** Applying an equity lens to all decisions surrounding how we do our jobs.

- Shorewood Police Trainings including De-escalation Training
- EDI Committee
- Library Staff Training
- YWCA Unlearning Racism
- Village Staff Internal Work Group

The Library Board of Trustees and the library are a part of Village government and has undertaken issues of diversity, equity, and inclusion. The Library Board created a mission statement to publicly affirm its commitment to diversity, equity, and inclusion.

While the Library staff have worked in concert with the Village Board and Committees to host or support educational and training events, the Library Board and staff have implemented specific actions in the library policy, operations and service delivery as well as charted below.

<b>Actions of Library Board/ staff to address DEI issues</b>
Approving and Equity Commitment to be clearly posted on the Library website with public feedback opportunity
Approving funding for guest speakers and other associated costs for public programs on EDI related topics
Attending Staff and Board educational programming on EDI
Supporting Job posting strategies that expand exposure range and target a more diverse audience
Offering financial assistance to candidates required to travel for our Director Search interviews
Approving adjusting fines and fees policies to avoid loss of access to resources for those burdened by such charges
Reviewing and revising our security policy with an equity lens
Through the Board’s Planning Committee working with the Library Director to develop measurable outcomes for the Equity Commitment
Through the Board’s Renovation Committee, adding an equity statement to the draft RFP for Renovation construction and an equity variable to the review criteria
Through the Board’s Budget Committee, requesting diversity in our investment portfolio options held by GMF
Outreach to neighbors and community members to provide education about library board participation in an effort to increase diversity
Supporting staff in efforts to select a diverse array of materials, authors, and topics
Acknowledging Juneteenth Day as an official federal holiday and compensating benefited staff with Holiday pay beginning in 2023

The Village has invested in external expertise to provide professional insight and counsel regarding several critical issues. These studies have, at times, influenced Board policies, management decisions, and internal operations.

**Consultant Studies:** Expertise that provided insight to the Village of Shorewood regarding diversity, equity, and inclusion issues.

- Police Reorganization Study - Alexander Weiss (2020)
- Transportation and Parking Analysis - Walker Consultants; Eriksson Engineering Associates, Ltd. (2020)
- Comprehensive Plan 2040 - Vandewalle & Associates, Inc. (2021)
- Police Recruitment and Selection Process - The Rising Group (2022)
- Commercial Zoning Update – Duncan Associates; CodeMetrics (2022)
- Diversity, Equity, and Inclusion Environmental Scan - Kairo Communications (2022)

The number of educational, policy, awareness, and training activities the Village has undertaken is impressive. However, the Village would benefit from a clearly defined approach that informs staff, residents, and other stakeholders about the vision, values, mission, and goals of the Board. Without this, the activities can be uncoordinated and fail to achieve the desired goals.

Staff have consistently reinforced these sentiments, conveying that Shorewood leadership must communicate a clear purpose regarding the Village’s focus on inequity, including a vision, mission statement, and expected outcomes.

As Shorewood government is continuing to stabilize after the challenging years the Board experienced under the leadership of a former Board president, clear direction from the Board and increased support for the work of the workforce is needed to effectuate positive change. Also, the Board must re-energize citizens and community organizations that do not want to be viewed a mere “rubber stamps” because they support diversity, equity, and inclusion efforts but have serious concerns about what actions are key. Thus, it is critical that the Board ensure that critical citizen committees, such as the Community Development Authority and Human Relations Commission are supported in a way that facilitates their ability to function effectively.

The Board has supported activities that provide increased education, training, awareness, and communication. While these actions are laudable, more systemic work must be done to achieve equity. Village government must address more fundamental issues including hiring, purchasing, and contracting processes, police/community relations, and increased utilization of data management systems.

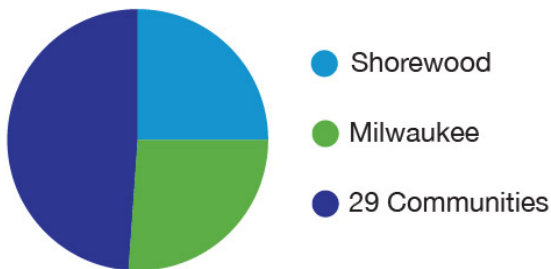
## Shorewood Workforce

The Village workforce consisting of Village and Library staff is almost 90% white with equal representation of men and women. The Village of Shorewood workforce consists of about 100 employees which fluctuates based on the seasonal work and the use of police civilians. Employees have worked at the municipality from 6 months to 40 years. Specifically, staff longevity is as follows:

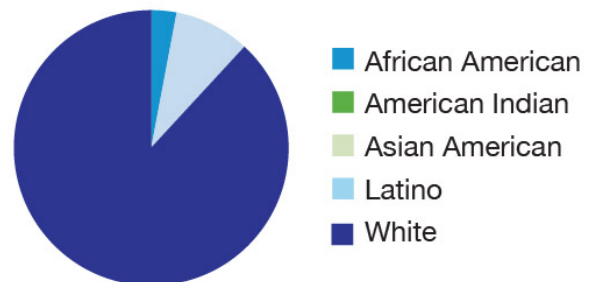
Longevity of Village Employees	
Longevity of Village Employment	Percent of Employees
5 years or less	50%
6 – 10 years	22%
11 – 20 years	20%
21+ years	8%
Months – 40 years	100%

The racial breakdown of the Village workforce is shown below.

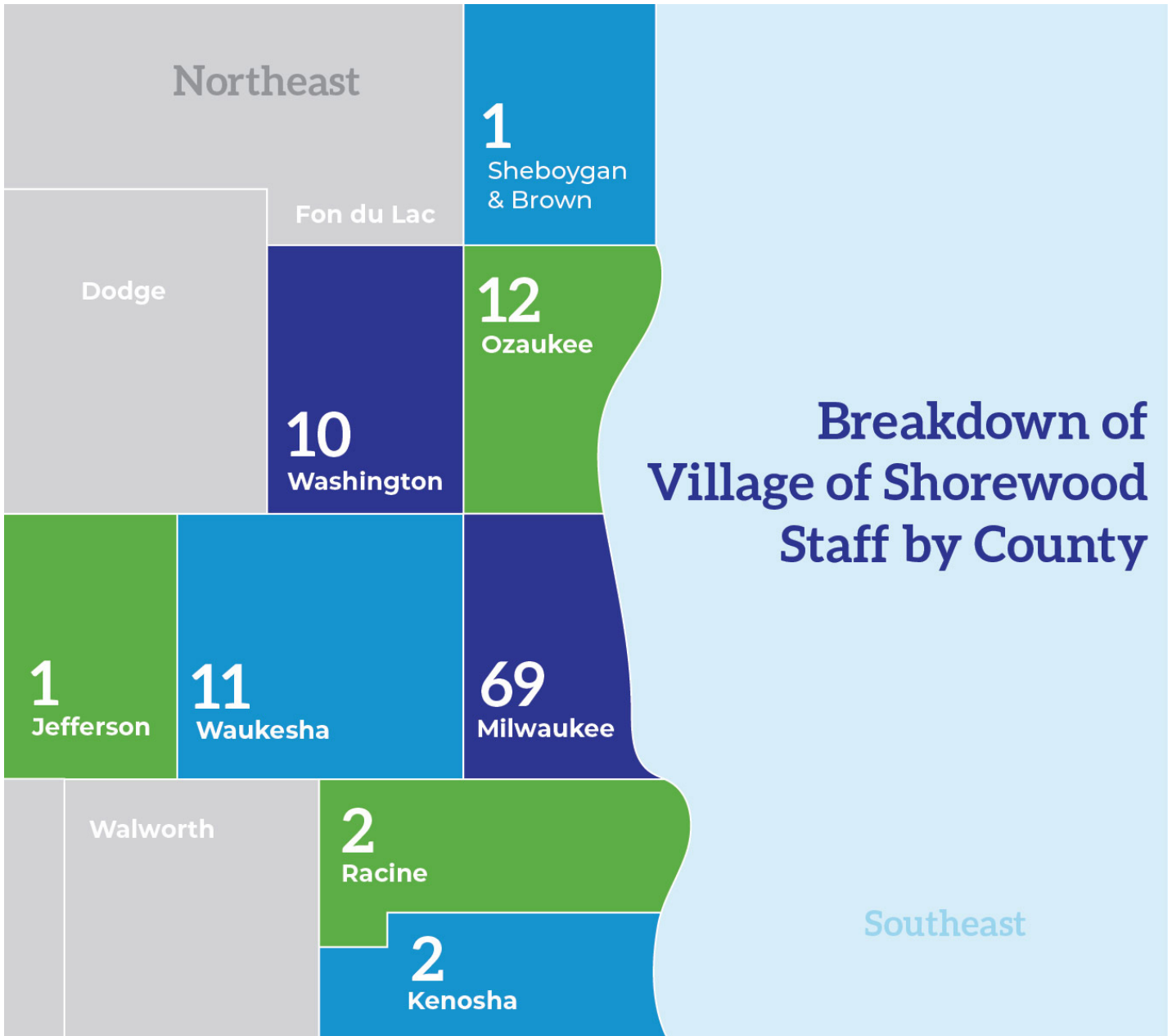
### Residency of Staff



### Number of Staff



The majority of the workforce commutes to the Village to work with only 25% being Shorewood residents. Employees that are not Shorewood residents represent thirty other communities, nine counties. Many employees reside in communities that have predominantly White residents; Milwaukee is the only community where residents of color were the majority population. Milwaukee residents comprise about 26% of the workforce. The fact that only 25% of Shorewood employees reside in Shorewood initially raised concern regarding whether staff bought into Shorewood’s interest in diversity, equity, and inclusion. The residency of employees is no longer a concern because the reality is that many individuals do not work in the community which they live in. For example, many Shorewood residents work outside of the Village with an average commute time for Shorewood residents to work being about 22 minutes.



Data is not routinely collected for gender, race, ethnicity, age, or disability which makes it difficult for staff to identify changes in the workforce demographics. However, the collection of demographic data that identifies personal information is a sensitive issue. Security and privacy measures must be taken to protect the information. Guidelines must address the sensitivity of the information. However, collection and analysis of data can assist Shorewood’s ability to evaluate its effectiveness and to make the necessary course corrections in its quest to achieve diversity, equity, and inclusion.

# Workplace Culture

The Village staff is a relatively small governmental group in size, located in four locations. While fairly homogeneous racially, there is diversity in age, gender, sexual orientation, disability, and other factors that highlight diversity. Often conversations with staff about diversity became conversations about workplace culture. Some employees wanted to feel that their professional opinions were valued. Specifically, some staff did not feel that they were supported by some Board members; some felt that their professional expertise was not respected by the community at large. Staff indicated the culture reflected a lack of engagement and a sense of isolation. Turnover was cited as an indicator of a workplace that lacked a sense of belonging, camaraderie, and inclusion.

A priority for staff was the need for improvement in their workplace – to make it more inclusive, a positive place for them to work. In interviews and follow-up meetings and conversations with staff, a common theme was the fact that staff did not feel a part of an inclusive work community. At least one employee indicated that they would not relocate to Shorewood even if they could afford to in part due to the disconnected relationship between elected/appointed officials and staff.

Staff were less focused on diversity, equity, and inclusion issues. In fact, requests from the Kairo team for department heads to identify staff that could be interviewed were not always responded to. Opinions about diversity, equity, and inclusion initiatives ranged from “People bristle when they hear EDI– afraid they did something wrong” to “They’re disgusted that people are just recognizing the importance of diversity now.” “It’s an eye roll either way.” “People will be against it if its labeled EDI- that doesn’t mean they’re against the ideas.” Employees identified major challenges that could serve as barriers to achieving equity.

What is the biggest challenge to achieving diversity, equity, and inclusion goals?			
<i>Lack of clarity about the problem</i>	<i>Lack of understanding their role/ purpose on the EDI Committee</i>	<i>Identifying the end goal</i>	<i>Lack of communication</i>
<i>Lack of transparency</i>	<i>Lack of time – already overworked</i>	<i>Lack of relevance – where does this fit in?</i>	<i>Fear of speaking honestly</i>
<i>Fear of reduced standards</i>		<i>Fear of displacement in jobs</i>	

Staff suggestions for improving the workplace culture focused on building a sense of team, of connection through activities. These specific concerns were identified.

1. The failure of Shorewood leadership to communicate a clear purpose for the overall Village focus on inequity, expected outcomes, a common vision.
2. A fear about what achievement of diversity, equity, and inclusion goals means regarding their employment with the Village.
3. A sense of being overwhelmed by their job responsibilities and a lack of department capacity to take on more.
4. A perspective that the Village Board that does not value their professional opinions or demonstrate a value for their work or contributions to the Shorewood.
5. The perception of some staff that residents' service expectations are extremely high which can create tension between residents and staff.

What the Kairo team came to understand is that before Village staff can effectively focus on diversity and inclusion as it pertains to people of color or other marginalized groups, their views regarding how the Village culture affects them in a negative way must be addressed. While staff discussed diversity issues at various levels of engagement, staff were more engaged when discussing their views about the lack of inclusiveness of all staff in Village government.

# Village Policies and Practices

Kairo analyzed the policies and practices implemented in three key functional areas: employee hiring, purchasing, and contracting.

## Workforce Equity: Employee Hiring Process

While the significant hiring of individuals who reside outside of Shorewood is not a concern, it should be noted that only two of the thirty communities that Shorewood staff reside in have significant populations of color. People of color comprise about 60% of the Milwaukee population and about 40% of the Racine population.

The ability of Shorewood to diversify its workforce is further limited because of its current hiring practices. The Village's standard operating procedure for the employee hiring process raised these concerns in the Kairo analysis:

- 1.** Interview panels routinely include staff who will be co-workers or subordinates to the new hire which can result in in-group favoritism on the selection committee. Having a person who does not work for the Village participate as a member of the selection committee, participating on interview panels can add diversity and relevant expertise. Adding individuals that represent marginalized communities to selection committees lessen the impact of in-group favoritism.
- 2.** Interview panels include Village Board members which can negatively influence the dynamics between the Board, Village Manager, and staff. The Village Manager should be the employee that is directly supervised and hired by the Board; it is important that clear lines of authority, reporting, and supervision are respected and maintained. This facilitates a culture of equity and inclusion.
- 3.** An in-depth review of the hiring process is required to eliminate, if present, procedures that can inadvertently bias hiring decisions and diminish opportunities to ensure workforce equity. Areas for assessment include how the Village values applicants' education and experience, ensures inclusive language in job descriptions, and utilizes the web primarily for dissemination of job information.
- 4.** Access to demographic data is not readily available.
- 5.** The Village does not advertise in media or other resources that traditionally connect with people of color.
- 6.** The Village does not have a recruiting and information dissemination process that includes professional organizations that are led by people of color or provide professional or employment services to marginalized communities.

Greenwald and Pettigrew found that when employers engage in the hiring process, they unintentionally fail to use a racial lens. Instead, they use a traditional approach that does not make employment information available in communities of color. This traditional approach reinforces in-group favoritism; individuals automatically favor others like them resulting in greater access to jobs and promotions for people similar to those of the in-group. This does not mean there is an intentional effort or decision to be exclusive, but there is no intentional effort to be inclusive in the provision of opportunities to participate in the hiring process. In fact, the literature reinforces the fact that often employment discrimination is not caused by an intention to harm people different from us, but by favoritism directed at helping people similar to us.

The recent selections of the Village Clerk, Chief of Police and Police Captain demonstrate the Village's commitment to diversity in hiring. However, concrete strategies must be consistently employed to achieve workforce equity. A pilot effort employed by the Village administration and Kairo Communications focused on disseminating information to professional organizations that could increase dissemination of job opportunities to communities of color to assist with getting the word out about the vacancy at Shorewood. The leaders of the organizations contacted were all interested and identified ways they could support the Village by (1) using their social media to get the word out about the vacancy, (2) informing their clients about vacancies, (3) sharing the information with other organizations, (4) sharing their resource network with Shorewood, (5) meeting with Shorewood staff to share their knowledge as a resource.

This type of action is necessary to change the status quo. However, beyond diverse hiring, staff retention is critical as well. A study conducted by University of Wisconsin-Milwaukee researchers for the Shorewood School District reinforced the fact that while hiring people of color can increase diversity, the culture of the workplace determines whether they stay. Specifically, the research emphasized how a lack of relational trust impacts teachers, students, and the environment which affects the retention of diverse staff. Increasing diversity through hiring can have unintended consequences if the organization's does not have a culture that fosters relational trust and empathy. Thus, management must ensure effective on-boarding, training, and support are provided to new employees in an equitable and inclusive culture.

## **Contracting Equity: Village Purchasing and Contracting Processes**

The Village Board adopted purchasing and contracting policies that could generate utilization of businesses owned by people of color and women. However, these policies have not been implemented. Shorewood does not have purchasing and/or contracting processes that include minority businesses in general, and/or certified minority and women owned businesses specifically.

In 2017, the Village Board adopted Policy No. 21: Purchasing and Accounts Payable for the purpose of establishing guidelines for purchasing and accounts payable. One of the goals of this policy is for the Village to promote open and competitive processes, which provide equal opportunity access to any qualified and interested potential vendor for the major purchases of the Village. These policies which could increase participation of vendors and contractors of color, these policies are not effectively utilized resulting in underrepresentation of people of color in these opportunities.

The Village uses a decentralized purchasing process that requires different department staff to lead the procurement process when they are purchasing commodities, implementing a construction process, or engaging professional services for their department. This can result in a fragmented, inconsistent approach that negatively affects efficiency, cost effectiveness and suppresses the utilization of underrepresented communities.

In 2021, the Board adopted Policy No. 40: Tax Increment District (TID) creation & Tax Increment Financing (TIF) assistance; Section 5: Hiring and Contracting for TIF Funded Projects Goals Developer receiving over \$1 million in TIF assistance must submit a plan complying with the Village of Shorewood's goals of utilizing Targeted Business Enterprise (TBE) vendors for 25% of the construction and 17% professional services for the approved development. Even though the Village Board adopted Section 5 of Policy No. 40, it has never been used. It is important to note that the Village has not received an application from a developer for a public assistance project since the policy was adopted. Given the limited availability for development within the community, it is important that the Village develop a process to ensure effective implementation of the policy when there is an opportunity to do so.

While language in a Request for Proposal (RFP) may identify the existence of DBE requirements, no such requirements have been developed. While bids may have language that requires the use of D/M/WBEs, no process exists even though a DBE is required on some bids, such as the Private Lead Service Line Replacement which included a Disadvantaged Business Enterprise requirement. However, DPW staff indicated that the department does not have a DBE requirement. Thus, the adoption of these policies is performative rather than substantive and will not provide opportunities for the intended parties without significant improvement in policy implementation.

Other issues that impact the utilization of vendors/businesses of color include:

- 1.** Contracts are advertised in the Daily Reporter and available on the Village website, but not in papers or sources that minority business owners usually contact to learn about purchasing and contracting opportunities.
- 2.** Village staff that are responsible for purchasing and contracting are not familiar with Disadvantaged, Minority, Women Business Enterprises (D/M/WBEs) or the certification process.
- 3.** The decentralization purchasing process lacks accountability regarding the notification, coordination, or utilization of minority/women owned businesses.
- 4.** The Village does not maintain data regarding the use of minority, women owned businesses. A lack of measurement indicates that the utilization of these businesses is not a priority for the Village of Shorewood.

While staff may not view implementation of these policies as priorities, other obstacles may also dampen their ability to implement these policies. Staff have indicated that they experience heavy workloads, do not have a highly functioning data management system, and lack knowledge about minority/women owned businesses or the certification process. These obstacles are not insurmountable for two reasons:

- 1.** Kairo Communications has significant experience in government purchasing, certification, and minority/women business utilization, and contracting which could support the Village's work to implement the policies as part of the strategic plan.
- 2.** There are government entities that operate D/W/WBE utilization and certification programs that the Kairo team is familiar with. These entities can serve as resources to support the Village integration of D/M/WBE processes into its operation.
- 3.** The Kairo team is familiar with minority and women owned businesses that could be informed of potential business opportunities in the Village.
- 4.** The Kairo team is also familiar with organizations that provide technical assistance and support to many minority and women owned businesses. These organizations have mechanisms for informing entrepreneurs about potential business opportunities.

## Police Department and Community Relations

Police leadership changed significantly in 2022, increasing diversity. The hirings of Chief Heather Wurth and Captain Fernando Santiago demonstrate specific hiring decisions that valued equity and professional excellence.

In many communities, police relations with communities of color are sometime fragile. Issues of disparities in the rate of arrests, stops for traffic violations, traffic citations instead of written warnings are some of the issues discussed nationally and locally. The Weiss Police Organizational Report confirmed evidence of these issues in Shorewood. Some of the key findings of the report include the following data regarding the Shorewood Police Department (SPD):

1. Of all the drivers stopped, 57% of drivers stopped are male and 44% are members of racial or ethnic minorities.
2. Black drivers were cited 44% of the time (363/820) while white drivers were cited 35% of the time (522/1481).
3. Among Milwaukee residents arrested by the SPD, 74% are Black, while the Black population of Milwaukee is 39%.
4. Among Shorewood residents arrested by the SPD, 11% are Black, while the Black population of Shorewood is 3.2%.

While this data from the report reflects similar issues raised in many communities of color regarding the existence of bias in policing, there is also additional information that provides a different context for viewing this data. In March 2021, Julie Paque provided contrasting information based on her analysis of the data. One of the key points made by Ms. Paque is that an analysis of police data requires understanding of some nuances of the events. For instance, in some cases, police do not have the discretion to decide not to arrest some drivers if once they are pulled over and police find that they have an outstanding warrant.

Community organizations also raised issues regarding the SPD; Shorewood Moving Forward and Shorewood Solidarity Network raised the following issues:

1. There is clear evidence of racial inequity in policing in Shorewood.
2. The Village needs to create a more robust process of civilian oversight.
3. The complaint process must be brought up to national “best practice” standards.
4. Data collection, analysis, and access must be improved to ensure accurate reporting and transparent public access.
5. The Village must explore ways to go “beyond” policing, using non-sworn staff with different skills for activities that do not require/would better be served by alternatives to sworn police officers.

While differing on some issues, they also raised some similar issues regarding SPD's Use of Force policies and Vehicle Pursuit policies. Regardless of the differences in perspectives it is encouraging that the Police leadership acknowledge the data and recommendations of the Police Organization study and consider conflicting opinions from the community. The Chief and Captain have indicated an understanding of the need for positive interactions and clear communications when working not just with people of color, but all residents and visitors to Shorewood. This aligns with the recommendation of the Comprehensive Plan 2040 that the Board/leadership "consider implementation of the Shorewood Police Organization Study that will promote equity, diversity, and inclusion in department operations and policies." Information obtained for the environmental scan supports this recommendation.

The Police Organization Study focuses on both community outreach and organizational strategies that impact marginalized communities and include:

- 1.** Strengthen Community Policing through enhanced Community Engagement and Proactive problem-solving.
- 2.** Address Racial Bias and Disparities in Police Response
  - a.** Implement more effective communication channels with minority community leaders (e.g., business, service, religious) and with residents.
  - b.** Institute several organizational changes to address concerns regarding differential police response.
  - c.** Systematic evaluation of police responses using data.
  - d.** Continued efforts to recruit and retain minority officers.
  - e.** Training of Police Officers
- 3.** Responding to Citizen Complaints and Concerns

While the Kairo team agrees with the Police Organization Study regarding the need for additional police training, it must be acknowledged that currently the police department is engaged in significant trainings.

In alignment with the Policy Organization Study, the environmental scan reinforces the need to address racial bias and disparities in police response. Similarly, both reports identified several entities that play a role in police oversight which include the Village Board of Trustees and its Public Safety Committee, Village Administration, the Police Commission, Human Relations Commission and the Police Department. A well-defined coordination of responsibility and accountability would support the SPD efforts to implement the recommendations of the Police Organization Study, the efforts of the new Police leadership, and ensure progress and accountability.

## Community Development: Eradicating Structural Barriers

The historical information contained in this report highlighted Shorewood's past included discussion about redlining, racial covenants, and other discriminatory laws and actions sanctioned and perpetuated by government, often implemented and enforced by the corporate sector. While that discussion will not be duplicated in this section of the report, it is important to acknowledge the need to continue to eliminate actions and policy that perpetuate past racist actions and their residual impact.

However, research, in many disciplines, indicates that it is not sufficient to merely eradicate destructive actions or tear down structural barriers because a void will be created in society. If the void is not filled with productive, effective policies and practices, the void will be refilled with restrictive, debilitating policies that reinforce the worst of the past. As history has shown when the public has rejected racist policies in housing and other areas, government has eliminated them only to institute new racist policies in a different form with similarly devastating effect.

To its credit during the last five years, Shorewood has engaged in significant work to remediate the past and to carve out a new direction in housing, zoning, traffic, and community development. The Village Board, Community Development Authority, the Planning and Development Department, the Public Works Department, and others have played critical roles in this work. The Village has commissioned several studies which have documented the past and identified current opportunities for innovative change and improvement to Shorewood in general, and its diversity, equity, and inclusion, specifically. Those studies include:

1. Comprehensive Plan 2040
2. Housing Affordable Analysis
3. New Housing Fee Report
4. Transportation and Parking Analysis
5. Community Zoning Update

The Community Development Authority, along with the Library and Senior Resource Center, have sponsored educational forums where presenters have discussed the issues and responded to citizen questions and concerns. In addition, Shorewood residents have had the opportunity to review the related plans and provide their perspectives in Open Houses and other forums held by Village staff with the consultants.

While these studies and the related actions taken by the Village can have a positive impact, they are not an instant panacea and do not guarantee that the voids are filled in a way that increase diversity, equity, and inclusion. While a review of the studies found that issues relevant to diversity, equity, and inclusion were included, too often they were discussed in general, non-measurable terms. Kairo does not mean to be overly critical of the studies which reflect considerable investment of time, research, strategic thought, and professional expertise. These studies also provide comprehensive information that can support Village decisions in many critical areas. Kairo advocates for:

1. The use of quality strategies with a process for data collection, analysis, and evaluation to ensure that the recommendations in these reports are implemented in ways that are sustainable.
2. Village Board commitment to an ongoing focus on these issues regardless of other priorities.
3. The involvement of individuals from marginalized communities to ensure the continued use of a racial lens in the actualization and operationalization of recommendations.

While government can achieve great results, community support is often critical. This may include community willingness to transition from traditional values, such as wanting to maintain the height of buildings at four stories, to supporting changes that can raise not just the height of the buildings but the community's capacity to locate more families and businesses, including those owned and operated by individuals of marginalized communities. Community education continues to be necessary.

Thus, it is imperative that the Village continue to address structural and systemic barriers, such as those that have persisted in housing, zoning, traffic, and development, that preclude achievement and sustainability of diversity, equity, or inclusion.

## Racial Equity Planning Tools

GARE and Milwaukee County resources have been valuable tools in the development of the environmental scan. For example, Village leadership have used the Milwaukee County's Racial Equity Framework (Appendix A) and GARE's Theory of Change (Appendix B). The Village could also benefit from the use of basic planning tools to enhance their ability to address diversity, equity, and inclusion issues. Specific tools include the use of:

1. Utilization of a racial equity lens.
2. Data collection and analysis methods
3. An evaluation process to assess whether policies and processes implemented to address diversity, equity, and inclusion issues are effective and to make course corrections if appropriate.
4. Identification of organizations and networks that can add value to the work and build relationships that can be beneficial to the Village long term.
5. Assignment of accountability to ensure individuals are held responsible for specific actions, decisions, or outcomes.

Without the use of these tools, Village policies, operations, service delivery, and partnerships may not impact or be impacted by diversity, equity, or inclusion considerations. These tools could be utilized in the following manner:

1. In the refinement of the Village's current hiring processes to make it more equitable. The Village does not automatically track demographics of its workforce. This results in the Village not knowing the diversity of its workforce. Without a baseline measurement, there is little way of measuring changes or identifying if actions taken are effective.
2. In the implementation of policies intended to infuse equity into Village operations, such as, purchasing and contracting. The Village does not track utilization in its contracting process even though utilization of DBE is identified in its contracts. Also, the Village does not collect data regarding whether the Village purchases commodities from vendors of color. Regular tracking and reporting would have highlighted the fact that the policies were not being utilized.
3. In the way in which the Shorewood Police Department implements the Police Organization Study recommendations. The lived experiences of employees can impact an organization's ability to utilize an equity lens. Chief Wurth and Captain Santiago have the opportunity to utilize their lived and professional experiences in a way that impact the department's ability to provide quality services and build strong community relations. Their unique perspectives could assist the Village in building a more diverse, equitable, and inclusive police department and strong relations with marginalized communities.
4. In the implementation of critical parts of the Comprehensive Plan 2040. While the plan identifies several opportunities to increase diversity, equity, and inclusion, it does not provide any specifics or strategic steps for implementation of these ideas. For example, a recommendation of the Comprehensive Plan 2040 identified the need for Village government to "work with the Shorewood BID, the business community, and other partners to develop small business programs that attract and support small businesses led by people of color." However, neither the Village nor the BID collect or analyze data regarding whether the small businesses they contract with are owned by people of color or women.

The tools are an essential part of a strategic plan focused on making significant improvements in its internal operation and the formulation of a framework for dismantling barriers from a policy, operations, and service perspective. Without the use of these tools, it is likely that current Villages policies and operations will fail to have significant impact in changing the dynamics of the government in relations to diversity, equity, and inclusion. These tools support a strategic plan aimed at not only recognizing issues but addressing them as well. Failure to use these tools suggest limited commitment or resources on the part of the Village and relegate these issues to a low priority status.

# The Challenge to Achieving Excellence and Equity

At times, people believe that excellence and equity cannot exist in the same space; that excellence will be sacrificed in an effort to achieve equity. Kairo believes that this is false choice and that both excellence and equity are simultaneously achievable and that they can effectively complement each other and strengthen the organizational foundation. The Polarity Chart, a concept developed by Barry Johnson, illustrates the belief that excellence and equity can support each other.

An equitable system promotes the achievement of a high level of excellence. An over focus on excellence can have a detrimental impact on an organization; an over focus on equity can be detrimental as well. Both can have upsides, favorable attributes that propel an organization forward and both can have downsides that can harm an organization when one is the priority and the other dismissed as irrelevant.

## POLARITY CHART



## Findings

As result of the implementation of a multi-method research approach, the Kairo team identifies these key findings:

- 1.** The Board has not articulated a clear vision, mission, and expected outcomes for an effective diversity, equity, and inclusion agenda.
- 2.** While the Village has provided significant education and training opportunities, a more strategic learning approach would be more impactful.
- 3.** The current workplace lacks an inclusive culture which must be addressed before staff are motivated to focus on broader diversity, equity, and inclusion issues.
- 4.** The Village lacks equitable internal operations, specifically in hiring, purchasing, and contracting processes.
- 5.** The Police Department can improve relationships with communities of color by implementing the Police Organization Study recommendations and utilizing the expertise of department leadership.
- 6.** The Village must continue to address structural or systemic barriers, such as those that have persisted in housing, zoning, traffic, and development, that preclude achievement of diversity, equity, or inclusion.
- 7.** The Village lacks a data management and evaluation system hampering its ability to analyze diversity, equity, and inclusion metrics.
- 8.** The Village has not collaborated with organizations and communities of color that have expertise regarding the diversity, equity, and inclusion issues the Village experiences.
- 9.** The Village can maximize its achievement of diversity, equity, and inclusion by participating with key partners, such as, Milwaukee County and GARE.
- 10.** The Village must adopt a commitment to a sense of urgency and accountability to move diversity, equity, and inclusion forward.

## Recommendations for Strategic Plan

The Village has a core group of Shorewood Board members, administrators, staff, and residents committed to increasing diversity, equity, and inclusion. To facilitate the planning for strategic, the Kairo team identified these two goals that are critical for the Village to achieve:

1. Dismantle barriers that perpetuate marginalization, inequity, and exclusion.
2. Implement strategies that create a diverse, equitable and inclusive environment.

To achieve these goals, implementation of these four objectives is essential: (1) Design Strategic Approach, (2) Optimize Internal Operations, (3) Create Inclusive Community, and (4) Invest in Sustainability. For each objective, the team identified three strategies which are provided as a starting point for the development of a strategic plan. The team recognizing that Board, staff, and the community will consider, and perhaps, modify the goals, objectives, and strategies, but we offer this foundation for strategic plan development as a starting point. It is critical that the Village continue its efforts to achieve diversity, equity, and inclusion.

Foundation for Strategic Plan Development	
<b>Develop and implement a strategic plan that clearly identifies roles of Board, staff, residents, and partners to ensure quality goal achievement.</b>	
<b>Design Strategic Approach</b>	Ensure articulation by leadership of clear vision, mission statement, and expected outcomes.
	Maximize organizational capacity and manage system limitations.
	Facilitate use of resources and training to prepare stakeholders for plan development and implementation.
<b>Optimize Internal Operations</b>	Ensure equitable operational processes (i.e., hiring, purchasing, and contracting, effective community policing).
	Ensure community focused, efficient service delivery.
	Implement data management, evaluation, and accountability systems.
<b>Create Inclusive Community</b>	Create inclusive workplace culture.
	Create intentional learning community.
	Strengthen collaboration with Village partners.
<b>Invest in Sustainability</b>	Establish partnerships with organizations and communities of color.
	Utilize racial lens in decision making regarding organizational policies, internal operations, and service delivery.
	Work in partnership with Milwaukee County.

## Getting Started

While the environmental scan has been completed, the real work begins now. Without creation of a work plan, the Village's work to address issues of diversity, equity, and inclusion could stall. While there may be some uncertainty about how to proceed, the Kairo team has created a work plan that provides basic information about key actions that must be taken to create and implement the strategic plan. This work plan will facilitate the Village's effort to be strategic in its work to dismantle barriers, fill voids, and achieve diversity, equity, and inclusion.

## Conclusion

Kairo Communications thanks the Village of Shorewood for the opportunity to conduct this environmental scan and looks forward to development and implementation of a strategic plan. Dismantling barriers is a challenging task. There can be a tendency to want to retreat, to step away from tackling the issues of diversity, equity, and inclusion. In fact, some individuals interviewed suggested that the words diversity, equity, and inclusion be changed or not used in our work. So, in an effort to prevent individuals from shutting down or walking away from the proverbial "table", we could acquiesce to this subtle demonstration of privilege and power. But we know that those most affected by discrimination and inequity cannot walk away even if they wanted to and that the words hurled at them are demeaning and dehumanizing.

So instead of accommodating fear and the natural resistance to change, we work very hard to be intentional with our language and concentrated on our work. Because the reality is that the words can change...but the issues will remain. History can be ignored...but the policies and practices continue to impact families and communities. The words are not what caused the problem or what continues to perpetuate the consequences of inequity. Changing the words won't address the problem...changing policy, operations, and culture will.

We realize there is a fear often attached to change, especially when connected to issues of race and equity. Fear of the unknown, fear of losing privilege and power, fear of being marginalized and left out. For far too long, we have been in that swamp of fear, misunderstanding, and mistrust. It's time we put one foot in front of the other and make our way out together. For the research confirms that organizations that embrace diversity, equity, and inclusion can benefit in a host of ways - increased organizational performance, higher productivity, innovative strategies, excellent leadership, and a more inclusive and respectful workplace for all.

We hope that Village leadership will continue to promote, support, learn and lead to reap the benefits that diversity, equity, and inclusion can bring. As Village government, you have the power, control, and authority. Yes, we acknowledge that it is not limitless and there are parameters you must operate in, but you can be extremely impactful. We acknowledge that taking on this challenge could be viewed as a political risk, a competing priority among many others the Village has. But while all of that may be true, we are hopeful that the Village Board will see this as a matter of urgency, one that merits high prioritization. We hope you have the will.

While we are proud of our work; this work must be fluid and collaborative in nature. We look forward to continuing to talk with a variety of individuals, to review numerous documents, to analyze information through a racial equity lens. But perhaps, most important, the Kairo team will continue to listen, to learn, and to be a quality partner in this valuable endeavor.

## Appendix A

The Village of Shorewood's Board of Trustees adopted the Equity, Diversity, and Inclusion Framework created by Milwaukee County which is provided below. In reviewing this framework, we were able to categorize many of the activities implemented by Shorewood in the four main categories of the Framework: Education, Awareness, Training, and Policy. The adoption of the framework by the Village Board reflects the strong partnership between the County Executive David Crowley and Village Board President Ann McKaig. It also demonstrates the strong working relationship between the County's Office of Equity, the Intergovernmental Cooperation Council (ICC) and the Shorewood Village Board.



## Appendix B

### GARE Model of the Theory of Change

A GARE tool used in this environmental scan is its Model of Change Theory which identifies three goals: Normalize, Organize, and Operationalize. Kairo used this model to guide our work and the development of the recommendations for the strategic plan.

#### Normalize

1. Use a racial equity framework: A jurisdiction uses a racial equity framework to clearly articulate its vision for racial equity and to develop a shared understanding of key concepts, and a sense of urgency to make changes.
2. Operate with urgency and accountability: The most effective path to accountability comes when a jurisdiction creates clear action plans with built-in mechanisms accountability.

#### Organize

1. Build organizational capacity: Build staff and organizational capacity, skills and competencies. Involve staff at all levels of the organization to achieve institutional transformation. Build an infrastructure to support the work, internal changes and external partnerships with other institutions and community.
2. Partner with other institutions and communities: Government must work in partnership with residents, organizations, and other jurisdictions to achieve meaningful results.

#### Operationalize

1. Build organizational capacity: Build staff and organizational capacity, skills and competencies. Involves Implement racial equity tools: Implement new tools for decision-making, measurement, and accountability. Utilize strategies and tools to change the policies, programs, and practices that perpetuate inequities.
2. Be data-driven: Measurement must take place (1) to measure the success of specific programmatic and policy changes, and (2) to develop baselines, set goals, and measure progress towards goals.

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The Village of Shorewood

# Diversity, Equity, and Inclusion

ENVIRONMENTAL SCAN



**KAIRO**  
COMMUNICATIONS

Prepared by  
Kairo Communications LLP  
February 20, 2023

# APPENDIX 4

## Village of Shorewood Work Plan for Development of Diversity, Equity, and Inclusion Strategic Plan

Created by Deborah Blanks, PhD

Kairo Communications, LLP

March 15, 2023

In 2022 the Village of Shorewood contracted with Kairo Communications to conduct an environmental scan regarding diversity, equity, and inclusion, specifically focused on Shorewood Village government. At its meeting on February 20, 2023, the Village of Shorewood Board of Trustees received Kairo's final environmental scan report and presentation. The environmental scan provided valuable information including the historical and current context for issues, an analysis of organizational strengths and weaknesses, and findings and recommendations. The findings of the environmental plan are listed below.

1. The Board has not articulated a clear vision, mission, and expected outcomes for an effective diversity, equity, and inclusion agenda.
2. While the Village has provided significant education and training opportunities, a more strategic learning approach would be more impactful.
3. The current workplace lacks an inclusive culture which must be addressed before staff are motivated to focus on broader diversity, equity, and inclusion issues.
4. The Village lacks equitable internal operations, specifically in hiring, purchasing, and contracting processes.
5. The Police Department can improve relationships with communities of color by implementing the Police Organization Study recommendations and utilizing the expertise of department leadership.
6. The Village must continue to address structural or systemic barriers, such as those that have persisted in housing, zoning, traffic, and development, that preclude achievement of diversity, equity, or inclusion.
7. The Village lacks a data management and evaluation system hampering its ability to analyze diversity, equity, and inclusion metrics.
8. The Village has not collaborated with organizations and communities of color that have expertise regarding the diversity, equity, and inclusion issues the Village experiences.
9. The Village can maximize its achievement of diversity, equity, and inclusion by participating with key partners, such as, Milwaukee County and GARE.
10. The Village must adopt a commitment to a sense of urgency and accountability to move diversity, equity, and inclusion forward.

While the environmental scan has been completed, more work remains. The environmental scan comprises Phase One. Phase Two encompasses the creation and implementation of a workplan to spur strategic plan development. Phase Three will focus on the effective implementation of a strategic plan to achieve sustainable organizational and systems change. Combining these three phases positions the Village to achieve the goal of a diverse, equitable, and inclusive government.

**Transitioning from Environmental Scan to Work Plan Implementation**

As Kairo identified in the environmental scan, work plan implementation must result in the development of a strategic plan crafted to achieve the following:

1. Dismantle barriers that perpetuate marginalization, inequity, and exclusion.
2. Implement strategies that create a diverse, equitable and inclusive environment.

To dismantle barriers and implement key strategies, these four objectives lay the foundation for a work plan that develops a quality strategic plan: (1) Design Strategic Approach, (2) Optimize Internal Operations, (3) Create Inclusive Community, and (4) Invest in Sustainability. These four objectives are aligned with the environmental scan findings as illustrated below.

<b>Foundation for Strategic Plan Development</b>	
<b>Work Plan Objectives</b>	<b>Environmental Scan Findings</b>
<b>Design Strategic Approach</b>	Articulate a vision, mission statement, and expected outcomes.
	Address structural and systemic barriers.
	Promote accountability through timely and prioritization.
<b>Optimize Internal Operations</b>	Ensure equitable operational processes.
	Improve quality police/community relations.
	Implement efficient data management and evaluation systems.
<b>Create Inclusive Community</b>	Create inclusive workplace culture.
	Create intentional learning community.
<b>Invest in Sustainability</b>	Establish partnerships with organizations and communities of color.
	Work in partnership with Milwaukee County.

To be effective, the work plan must incorporate these elements:

1. Alignment with Racial Equity Framework adopted by Village of Shorewood.
2. Active Board of Trustees participation in foundational work for work plan implementation.
3. Staff engagement in work plan and commitment to strategic plan design and implementation.
4. Understanding of what diversity, equity, and inclusion mean and how they are manifested in Village government.
5. Consideration of the potential impact of strategic plan implementation on major Village priorities; development of strategy to mitigate negative and promote positive impact.
6. Participation of key stakeholders, specifically residents, staff and others, to hear their perspectives during work plan implementation and strategic plan development.
7. Utilization of existing partnerships and resources to support and inform the work plan creation.
8. Cultivation of new partners that represent marginalized communities as well as government entities and mainstream organizations to support plan development and implementation.
9. Creation of strategic actions designed to address the environmental scan’s findings and recommendations; willingness to modify plan to address additional issues, if appropriate.
10. Establishment of evaluation system to measure progress, ensure accountability, initiate course corrections, and validate achievements.

### **Work Plan Process: Nuts and Bolts Implementation**

Dr. Blanks, Kairo Communications, will manage the work plan development process and guide systems process change, resource development, and partnership cultivation. Kairo will engage in the following activities to lead implementation of the work plan which will result in creation of a strategic plan:

1. Conduct individual and group meetings.
2. Obtain Board guidance/direction.
3. Meet with staff group to develop strategic and actions for increasing staff engagement.
4. Work with staff to analyze specifics of systems and processes; develop written procedures to document systems change decisions.
5. Meet with existing partners and cultivate new partners to identify areas of interest and collaborative opportunities,
6. Meet with Milwaukee County to maintain working partnership to achieve mutual goals.
7. Investigate how other jurisdictions have right sized processes and procedures to fit their environment.
8. Utilize Cornell University as a resource regarding specific diversity and inclusion frameworks.
9. Develop resource guidebook to promote sustainability of partnerships that promote goal achievement,
10. Develop strategic actions, priorities, timeline, accountability, and performance indicators based on input of Board, staff, and others.
11. Obtain feedback and appropriate approvals, revise plan as appropriate.
12. Utilize communication process to inform leadership and others of progress, as appropriate.

Dr. Blanks will work with the Board of Trustees and staff leadership. While she will not continue to engage the EDI committee that was formed a few years ago, she will work with three key groups: the Board, the executive team comprised primarily of department heads, and the Internal Work Group. Questions that participants will be asked during the process include:

1. Are these the right areas to focus on?
2. Are there other key issues we should address?
3. What is a realistic timeline for addressing each step?
4. Who should be involved in the process for this specific action step?
5. How will we measure whether we have effectively addressed the specific issue?
6. Who is accountable for goal achievement?

The perspectives of stakeholders and the work of Kairo Communications will be used to create a plan that includes the following:

1. How specific focus areas are addressed.
2. What specific action steps will be implemented.
3. What the implementation timeline will be.
4. What performance indicators are established.
5. How accountability for specific actions is assigned.

## Work Plan for Strategic Plan Development

The findings of the environmental scan are embedded into the work plan. The plan presented in the chart below identifies the major and specific focus areas and the timeframe in which each specific area would be focused on. The timeline spans from April through September 2023 giving adequate time to produce all of the elements of the strategic plan.

Work Plan for Strategic Plan Development									
Major Focus	Specific Focus Areas	Timeline (April through Sept.)						Foundational Work	
Board of Trustees		A	M	J	Jy	A	S		
	Goal Setting								
	Vision, Mission								
	Scope of Plan								
	Policy Identification								
	Citizen Committees								
	Alignment with MKE County								
	Prioritization								
	Evaluation Criteria								
Village Administration		A	M	J	Jy	A	S	Performance Indicators	Accountability
	Resources and Priorities								
	Human Resources Process								
	Purchasing Process								
	Contracting Process								
	Police/Community Relations								
	Data Management Process								
	Community Education								
Village Staff		A	M	J	Jy	A	S	Performance Indicators	Accountability
	Work Group Expansion								
	Staff Engagement Priorities								
	Engagement Work Plan								
	Staff Training Plan								
	Staff Assessment								
Shorewood Community		A	M	J	Jy	A	S	Performance Indicators	Accountability
	Partnership Goals and Expectations								

	Partner Identification	■	■	■					
	Partner Collaboration		■	■	■	■			
	Community Input				■	■	■		
	Communications		■	■		■	■		
<b>External Partners</b>		<b>A</b>	<b>M</b>	<b>J</b>	<b>Jy</b>	<b>A</b>	<b>S</b>	<b>Performance Indicators</b>	<b>Accountability</b>
	Organizations	■	■	■	■	■	■		
	Organizations of Color	■	■	■	■	■	■		
<b>Government Partners</b>		<b>A</b>	<b>M</b>	<b>J</b>	<b>Jy</b>	<b>A</b>	<b>S</b>	<b>Partnership Opportunities</b>	
	Milwaukee County	■	■	■	■	■	■		
	GARE	■	■	■	■	■	■		
	Human Resources Strategies	■	■	■	■				
	Purchasing Strategies			■	■	■			
	Contracting Strategies			■	■	■			
	Rightsizing Strategies				■	■	■		
<b>Systems Change Resources</b>		<b>A</b>	<b>M</b>	<b>J</b>	<b>Jy</b>	<b>A</b>	<b>S</b>	<b>Resource Utilization</b>	
	Cornell University	■	■	■	■	■	■		
	Resource Guidebook			■	■	■	■		
	Training Tools			■	■	■	■		
<b>Plan Evaluation</b>		<b>A</b>	<b>M</b>	<b>J</b>	<b>Jy</b>	<b>A</b>	<b>S</b>	<b>Performance Indicators</b>	<b>Accountability</b>
	Plan Implementation				■	■	■		
	Course Corrections					■	■		
	Goal Achievement						■		

**Summary**

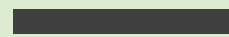
This type of planning, when done well, facilitates the creation of a collaborative, comprehensive strategic plan that can be effectively implemented over the next five years. Some environmental improvements could occur organically as the Board, staff, residents, and others are engaged in work plan implementation. Three areas which will serve as indicators of the ability for the Village to effectively implement the work plan are: 1) the Board’s setting the foundation for plan implementation by establishing a vision, mission, and goals; 2) the Village implementing improvements to provide accessibility to and equity in its hiring process; (3) the level of staff participation in developing a work plan that addresses workplace issues that impact diversity, equity, and inclusion.

Kairo Communications appreciates the opportunity to continue to work as a partner in this endeavor with the Village of Shorewood. Based on our experience, we are confident in the Village’s ability to increase diversity, equity, and inclusion in a way that positively impacts the Shorewood government and community.



VILLAGE OF SHOREWOOD

# DEI Resource Guide



PREPARED BY  
Deborah C. Blanks, PhD.  
**Kairo Communications**

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## Village Administration

- Rebecca Ewald, Village Manager
- Chris Anderson, Assistant Village Manager
- Toya Harrell, Village Clerk
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- Hayley Johnson, Interim Director of Public Library
- Elizabeth Price, Director of Senior Resource Center

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## Kairo Communications LLP Project Team

- Project Manager: Deborah Blanks, PhD
- Project Team members:*
- Katie Pritchard, PhD
  - David Pate, PhD
  - Karla Harvey
  - Geraud Blanks

## Graphic Designers

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- Angela Andre Design Services - Strategic Plan and Resource Guide

# Introduction

Kairo Communication created this Resource Guide to support the Village of Shorewood's implementation of its strategic plan. Designed to integrate diversity, equity, and inclusion (DEI) into the fabric of the Village, its leadership structure, internal operations, community and government partnerships, and service to Shorewood residents.

This resource guide does not contain required actions or strict guidelines, but rather identifies valuable resources the Village may not be familiar with and provides tools, ideas and examples that hopefully generate discussion that drives the development of approaches best suited for implementation by the Village.

## **Government Strategic Plans: Examples**

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A strategic plan is a formal document that conveys a company's commitment to DEI. It outlines, specifically, where the company's efforts are focused, and the steps being taken to build a strong DEI culture. The Village is one of several government organizations that have created strategic plans regarding diversity, equity, and inclusion. The plans created by two federal agencies which focus on some areas similar to the Village's, such as, workforce diversity and supplier diversity are identified below.

- Board of Governors: The Federal Reserve System: Diversity, Equity, and Inclusion Strategic Plan, 2022 – 2025. *Diversity, Equity, and Inclusion Strategic Plan 2022–25 (federalreserve.gov)*. November 2022.
- US Department of State. Secretary's Office of Diversity and Inclusion. Diversity, Equity, Inclusion, and Accessibility (DEIA) Strategic Plan, 2022 – 2026. *Diversity, Equity, Inclusion and Accessibility (DEIA) Strategic Plan (state.gov)*

## Organizational Readiness Assessment

Once a strategic plan has been created, there may be a tendency to let it sit on the shelf, unsure of the next steps for implementation.


**The Board and administrative leadership must maintain momentum for implementing the plan. At the same time, leadership must be realistic about the preliminary work that must be done to increase organizational readiness and the impact of competing priorities, staff resistance, and limited capacity.**


The goal of assessing readiness is not to find fault or place blame but rather to increase the ability of plan implementors to achieve success.


**Implementation of the plan requires preparation** to ensure those charged with implementing specific areas of the plan are ready to effectively perform their tasks.

Readiness can be increased by doing the following:

1. Identify the person responsible for leading the implementation of a specific strategy or task.
2. Assess the readiness of the lead person and others charged with implementing a specific strategy by identifying if using this rating:

 Green: They are ready to implement the action.

 Yellow: They have some concerns but feel they that can be addressed.

 Red: They are concerned and feel they need much more knowledge and support before engaging in work to address a strategy or actions.

3. Identify a realistic start date.
4. Create key performance indicators and/or metrics to assess whether the actions taken result in quality outcomes.

**The chart that follows provides a structure for assessing organizational readiness for plan implementation.**

# ORGANIZATIONAL READINESS ASSESSMENT

## GOAL ONE: PROVIDE ORGANIZATIONAL LEADERSHIP TO STRUCTURE IMPLEMENTATION OF STRATEGIC PLAN.

### STRATEGY ONE: Integrate Equity Statement framework into the work of the Board of Trustees.

	Lead Person	Readiness	Start Date	Metrics
		<div style="display: inline-block; width: 15px; height: 15px; background-color: green; margin-right: 5px;"></div> <div style="display: inline-block; width: 15px; height: 15px; background-color: yellow; margin-right: 5px;"></div> <div style="display: inline-block; width: 15px; height: 15px; background-color: red;"></div>		
Analyze and update organizational policies and procedures using an equity-centered lens to mitigate potential adverse effects.				
Require that a Diversity, Equity, and Inclusion Impact Statement be included in all staff, committee, and consultant reports to Board.				
Make ongoing commitment to engage residents that reflect diversity of community and increase diverse representation in Village appointments to commissions and committees.				
Include Equity Statement framework into appointee training and require annual report from all Board committees regarding actions and outcomes that align with this framework.				
Utilize diverse community experts to provide perspectives that add value to the work of the Board.				

### STRATEGY TWO: Support Village administration’s use of structured process for plan implementation.

In concert with the Village Board, the Village Manager establishes annual DEI goals for implementation based on organizational priorities, capacity, and investments.				
Village Manager works with Village Board and department heads to establish metrics for all DEI implementation initiatives.				
Initiatives are incorporated into department work plans.				
Department heads provide semi-annual reports to Village Manager regarding successes, challenges, and resource needs for DEI goal achievement.				
Conduct year-end assessment of work plan achievements.				
Acknowledge staff’s work to achieve DEI work plan goals.				

## GOAL TWO: CULTIVATE ORGANIZATIONAL COMMITMENT TO VALUES OF DEI.

### STRATEGY ONE: Provide diverse array of activities to engage staff around learning, relationship building, and resistance in relation to cultivating a diverse, equitable, and inclusive environment.

Incorporate DEI training into Human Resources training plan.				
Identify training that staff that engage in on an individual basis.				
Engage in informal learning activities that promote opportunities for socialization among staff.				

	Lead Person	Readiness	Start Date	Metrics
<b>STRATEGY TWO: Incorporate DEI strategic plan information and progress into existing communication channels and develop new channels where needed.</b>				
Leadership communicate support of and expectation of staff participation in DEI activities through internal communications and meeting agendas.				
Ensure annual prioritization, planning, and budget documents reflect applicable DEI goals.				
Establish and implement a schedule for sharing progress toward DEI goals in Village communications.				
Develop a year-end summary of progress towards DEI goals and deliver to Village Board.				
<b>STRATEGY THREE: Establish culture of accountability for plan implementation.</b>				
Develop self-assessment tool for staff, Village Board, and appointed volunteers to complete annually to support ongoing engagement with DEI objectives and plan implementation.				
Track department utilization of all policies and practices that pertain to DEI outcomes.				
Ensure that Village Manager reports to Village Board include effort and outcomes related to DEI goals.				
As policies and code are updated, reflect DEI goals where applicable.				
<b>GOAL THREE: ENSURE VILLAGE OF SHOREWOOD HAS AN EQUITABLE AND INCLUSIVE HUMAN RESOURCES SYSTEM.</b>				
<b>STRATEGY ONE: Ensure human resource system provides equitable employment opportunities.</b>				
Implement DEI best practices for development of job descriptions, screening, interview, and selection processes.				
Disseminate information regarding employment opportunities to diverse organizations.				
Cultivate a process to utilize expertise of representatives for diverse organizations in selection process.				
Develop process to collect data regarding hiring process and employee demographics.				
<b>STRATEGY TWO: Develop process to collect data regarding hiring process and employee demographics.</b>				
Provide quality supervision and mentoring to ensure that all staff (and elected and appointed officials) can contribute to DEI outcomes.				
Incorporate staff readiness into the readiness assessment for each initiative.				
De-stigmatize the need for ongoing learning in relation to advancing diversity, equity, and inclusion.				
Ensure that staff have access to mentoring relationships that decrease resistance and isolation in relation creating an inclusive workplace.				

	Lead Person	Readiness	Start Date	Metrics
<b>GOAL FOUR: IMPLEMENT STRATEGY TO INCREASE SUPPLIER DIVERSITY IN VILLAGE OPERATIONS</b>				
<b>STRATEGY ONE: Create process to promote participation of certified disadvantaged, minority, and women owned businesses (D/M/WBEs) in Village contracting opportunities.</b>				
Develop department procedures to implement Board minority owned businesses utilization policy in Public Works department.				
Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.				
Set expectation for prime contractors to utilize certified businesses in contract work when appropriate.				
Track department utilization of certified businesses.				
<b>STRATEGY TWO: Create process to promote participation of certified disadvantaged, minority and women owned businesses (D/M/WBEs) in Village procurement process.</b>				
Implement process to increase utilization of certified businesses in Village’s decentralized purchasing system.				
Engage with government entities that utilize certified businesses in the purchase of goods and services to learn about their applicable procurement processes.				
Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.				
Engage with diverse professional organizations to disseminate information to certified businesses regarding Village contracting and procurement opportunities.				
<b>GOAL FIVE: CREATE AND SUSTAIN COMMUNITY NETWORK TO SUPPORT VILLAGE ACHIEVEMENT OF DEI GOALS.</b>				
<b>STRATEGY ONE: Utilize existing community partners to achieve DEI goals.</b>				
Coordinate with Shorewood Library Board to operationalize its Equity Statement to reflect DEI objectives.				
Build connection with Shorewood School District to leverage their racial equity work to benefit Village government.				
Collaborate with Shorewood BID to increase marketplace opportunities for minority owned businesses.				
Collaborate with Shorewood Today to inform residents, staff, and partners about Village of Shorewood commitment to and achievement of DEI goals.				
<b>STRATEGY TWO: Maintain intergovernmental cooperation on equity, diversity, and inclusion issues.</b>				
Maintain partnership with Milwaukee County to collaborate and share resources.				
Participate in County Intergovernmental Cooperation Council and its Racial Equity and Inclusion Committee.				
Expand relationships with other Milwaukee County municipalities to enhance and promote DEI efforts.				

	Lead Person	Readiness	Start Date	Metrics
<b>STRATEGY THREE: Create process to promote participation of certified disadvantaged, minority, and women owned businesses (D/M/WBEs) in Village contracting opportunities.</b>				
Create a network of organizations to disseminate information to diverse communities.				
Cultivate relationships with organizations for professionals to serve on interview panels.				
Promote awareness and participation in annual events that recognize and pertain to equity, diversity, and inclusion.				
<b>GOAL SIX: ENSURE VILLAGE OF SHOREWOOD SERVICES DEMONSTRATE VILLAGE'S COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION.</b>				
<b>STRATEGY ONE: Reflect on Board's Equity Statement in the Village's work in the community.</b>				
Implement community outreach to diverse communities to strengthen police/community relations.				
Improve communication and engagement with residents who rent their homes.				
Consider the accessibility of Village government and operations for people who may need assistance to participate.				
Continue to expand the number of residents who subscribe to the Village communications.				
Utilize certification lists created by government entities that certify disadvantaged, minority, and women owned businesses.				
Increase participation of diverse groups and individuals through direct engagement and community surveys.				

## Equity Impact Statement

An equity impact statement is similar to a fiscal note at the end of a report submitted to a Board. The fiscal note identifies the fiscal impact of the recommendations contained in the report. Similarly, an equity impact statement at the end of a report contains an assessment of the impact of the recommendations on the Village’s current diversity, equity, and inclusion as well as future goals.

The purpose of the equity impact statement is to ensure that the authors of the report consider the impact on DEI efforts in their analysis and recommendations and to inform the Board of how the report’s recommendations impact achievement of DEI goals and diverse residents and communities. When appropriate, the equity impact statement can include information about the fiscal impact as well.

### Examples

1. While implementation of a fee to use Atwater Park may generate some additional revenue for the Village, it places a burden on some families and may convey a message that the intent of the Village is to restrict access to only Shorewood residents or families with the ability to pay this additional fee.
2. The maintenance of strict guidelines regarding the height of commercial property in Shorewood maintains a strong tradition of community pride and protects the Village from increased population growth and auto congestion. However, the height restriction could also serve to restrict business growth, diminish the ability for small, diverse business owners to locate in Shorewood, and prevent families from obtaining affordable housing in Shorewood.

## Developing Tactics

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The goals, strategies, and actions in the strategic plan are designed to support achievement of the Village of Shorewood's Board's mission, vision, and values. However, development of specific tactics can increase the effectiveness of plan implementation.

Having Individuals who are responsible for or involved in work impacted by specific goals and strategies are best positioned to develop the tactics. Hopefully, these individuals will also recognize areas where their DEI knowledge is limited and invite input from those with relevant DEI knowledge and experience. An example of how tactics improve the plan implementation is illustrated below using Goal Three as the basis of this example.

**Goal Three:** Ensure Village of Shorewood has an equitable and inclusive human resources system.

**Strategy One:** Ensure human resource system provides equitable employment opportunities.

**Action One:** Design and utilize an equitable hiring process.

The goals, strategies, and actions for Goal Three focus on the creation of an equitable human resources system that provides equitable employment opportunities. Tactics divide an action into smaller, manageable steps that support goal achievement. Staff involved in the specific areas can provide significant insight into how to develop tactics that will be most effective. Government and community partners can also add significant value to the development and implementation of those tactics. The tactics listed below can be used to design an equitable hiring process which is Action One for Goal Three.

### Action One Tactics:

1. Ensure that all job descriptions use gender-neutral, non-biased language.
2. State your commitment to building a diverse, equitable, and inclusive culture in your job descriptions.
3. Write results-based job descriptions.
4. Conduct anonymous screenings.
5. Ban "culture fit" as a reason for rejecting a candidate.
6. Utilize a structured interview process that includes a diverse interview panel
7. Track demographics of workforce

## Government Partnerships

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The Village of Shorewood has several partners including Shorewood Today the Shorewood School District. The Shorewood BID, and the Shorewood Public Library. The Village could benefit by strengthening its partnership with other government entities, especially Milwaukee County, regarding equity and inclusion, minority business utilization, and purchasing. Thus, the information below identifies government entities focused on equity and inclusion and others focused on minority business certification and utilization.

### Government Equity and Inclusion Offices:

1. Milwaukee County Office of Equity  
<https://county.milwaukee.gov> › Office-of-Equity
2. City of Milwaukee Office of Equity and Inclusion  
<https://city.milwaukee.gov> › Equity-and-Inclusion

## Disadvantaged Business Enterprise Utilization

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### Supplier/Contracting Diversity Implementation of Minority Business Enterprise Utilization Policy

Village staff can obtain information about how to implement Minority Business Enterprise policies and programs from government entities. For instance, the Village does not need to create its own certification program to identify existing minority owned businesses (MBEs). Several government entities certify MBEs, establish minority business utilization goals, and provide services to MBEs to support their ability to effectively participate in contract opportunities.

**1. Wisconsin Unified Certification Program (UCP) operated by the State of Wisconsin-Department of Transportation.** This program publishes Disadvantaged Business Enterprise (DBE) UCP Directory which lists all of the businesses certified by the Unified Certification Program.

<https://wisconsin.gov/Pages/doing-business/civil-rights/dbe/ucp-contacts.aspx>

**2. Milwaukee County's Office of Economic Inclusion is a partner in the Wisconsin Unified Certification Program.** Businesses can apply for certification through this office for inclusion in the Department of Transportation's DBE UCP Directory. The County's Office can also provide the Village with information about business utilization goals and contract compliance.

<https://county.milwaukee.gov/EN/Administrative-Services/Office-of-Economic-Inclusion>

## Community Partnerships: Communication Networks

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Staff can work with organizations of color to support the Village's efforts to achieve DEI goals in human resources, contracting, and purchasing and to build a stronger connection to communities of color. Traditional mainstream communication tools do not always connect with individuals or communities of color.

The organizations below can be used to disseminate information about employment and business opportunities to a diverse population, to provide information about employment opportunities and to increase diversity on the interview panels. In 2023, these organizations were contacted and agreed to disseminate information about Village of Shorewood employment opportunities to their networks. The Chambers of Commerce also disseminate information about contracting and purchasing opportunities to their members.

**1. FUEL Milwaukee (a part of the MMAC)**  
756 Milwaukee St, Milwaukee, WI 53202  
(414) 287-4100

**2. Employ Milwaukee**  
2342 N 27th St, Milwaukee, WI 53210  
[employmilwaukee.org](http://employmilwaukee.org)

**3. Latino Chamber of Commerce of SEW**  
530 S 11th St Ste 300A, Milwaukee, WI 53204  
(414) 509-6179

**4. Hmong Wisconsin Chamber of Commerce:**  
**Chamber of commerce in Milwaukee, Wisconsin**  
5423 N 118th Ct, Milwaukee, WI 53225  
(414) 645-8828

**5. African American Chamber of Commerce**  
1920 N Doctor M.L.K. Jr Dr, Milwaukee, WI 53212  
(414) 462-9450 <https://www.aaccwi.org/>

**6. Wisconsin Black Chamber of Commerce, Inc.**  
2900 W. Vliet Street. Milwaukee, WI 53208.  
414-306-6460 [admin@twbcc.com](mailto:admin@twbcc.com)

## Diverse Media Outlets

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Minority controlled newspapers are key sources of information in communities of color. These newspapers can inform readers about employment, contracting, and purchasing opportunities in the Village. They can also publish other information of mutual interest to build a stronger connection between the Village and communities of color.

### El Conquistador Latino Newspaper

4531 W Forest Home Ave, Milwaukee, WI 53219  
414- 383-1000

### Milwaukee Community Journal

3612 N Doctor M.L.K. Jr Dr, Milwaukee, WI  
53212 (414) 265-5300

### Milwaukee Courier

2003 W. Capitol Drive Milwaukee WI 53206  
414- 449-4860

### Milwaukee Times Weekly Newspaper

2238 N. Dr. Martin Luther King Jr. Dr.  
Milwaukee, WI 53212  
414-263-5088 Fax: 414-263-4445  
miltimes@gmail.com

### Spanish Journal

3712 W Pierce St, Milwaukee, WI 53215  
800-819-6397 414- 643-5683  
spanishj@spanishjournal.com

## Creating Key Performance Indicators (KPIs) and Metrics

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Key Performance Indicators (KPIs) and metrics are useful in gauging the progress made in plan implementation. KPIs and metrics are quantitative and qualitative measures that can help track the Village's progress in achieving the strategic plan's goals and objectives.

**KPIs** are high-level indicators that reflect an organization's overall success and impact, such as customer satisfaction or revenue growth.

**Metrics** are more specific indicators that measure activities and outputs. Both KPIs and metrics should be SMART, specific, measurable, achievable, relevant, and time bound.

Both measurements will help the Village gauge its progress and determine whether plan implementation is moving in the right direction.

**Shorewood's Strategic Plan** has six goals and thirteen strategies. Having too many indicators can overwhelm staff; having too few sends a message that this project is not very important. The KPIs and metrics identified below are examples. Village leadership and staff are best equipped to identify the right KPIs and metrics for the plan. Their participation will facilitate the alignment of the KPIs to the vision, mission, goals, strategies, and resources.

**Kairo recommends that the Village focus, to some degree, on developing baseline information in the first year of plan implementation so that progress can be benchmarked.** For example, it is difficult, if not impossible, to create a metric to increase minority business utilization by a certain percent if the current level of utilization is not known.

Kairo provides some examples of the KPIs and metrics that can be used to measure achievement of the goals.

## **Strategic Action Plan Goals: KPIS and Metrics**

### **GOAL ONE: Provide organizational leadership to structure implementation of strategic plan.**

**KPI:** The Village Board develops a structure that reflects equity in reporting, decision-making, and representation by 12/25.

**KPI:** Administration collects baseline data to inform establishment of key performance indicators and metrics by 6/25.

#### **Metrics:**

- Eighty percent of reports to the Board include an equity impact statement by 12/25.
- Board committees increase diverse representation by 10% by 12/25.
- Seventy-five percent of past Board policies are reviewed to determine incorporation of DEI issues by 12/26.

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### **GOAL TWO: Cultivate organizational commitment to values of DEI.**

**KPI:** Human Resources incorporates DEI training in comprehensive training program annually beginning in 2024.

#### **Metrics:**

- Seventy-five percent of staff participate in DEI training each year.
- Eighty percent of staff who receive DEI training rate the experience positively.
- 20 Village communications address DEI issues.
- The village database collects workforce demographics and other information relevant to DEI issues.

**GOAL THREE: Ensure Village of Shorewood has an equitable and inclusive human resources system.**

**KPI:** The Village achieves workforce diversity that reflects the level of diversity of Village residents (20%).

**Metrics:**

- Percent increase in diverse applicants
  - Percent of diversity interview panelists
  - Ninety percent accuracy of data collection regarding workforce demographics by 12/26.
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**GOAL FOUR: Implement strategy to increase Supplier Diversity in Village operations.**

**KPI:** The Village contracts with four certified minority businesses by 12/26.

**KPI:** The Village implements a minority business utilization process by 12/27.

**Metrics:**

- Percent increase in number of minority owned businesses with Village contracts.
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**GOAL FIVE: Create and sustain Community Network to support Village achievement of DEI outcomes.**

**KPI:** The Village has network of ten community partners connected to communities of color by 12/25.

**Metrics:**

- Number of community organizations disseminating information about Village employment and contracting opportunities.
  - Number of Village contract opportunities for minority business enterprises to submit bids.
- 

**GOAL SIX: Ensure Village of Shorewood services demonstrate Village's commitment to diversity, equity, and inclusion.**

**KPI:** Every three years, the Village will assess each service provided to residents to identify how DEI is embedded into the program or service.

**Metrics:**

- Number of Village sponsored forums focused on DEI relevant issues.
- Number of people of color attending events.
- Number of diverse presenters at committee meetings.

## Educational Resources

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The following resources are provided to support continuous learning regarding diversity, equity, and inclusion. The resources include 1) a list of resources from the Government Alliance for Racial Equity that provide information for organizations, 2) a reading list for individuals, 3) a list of videos, and 4) a Glossary of Terms.

### Government Alliance on Race and Equity (GARE)

The Government Alliance on Race and Equity is a national network of government institutions working to achieve racial equity and advance opportunities for all.

Across the country, governmental jurisdictions are:

- 1) Making a commitment to achieving racial equity
- 2) Focusing on the power and influence of their own institutions, and
- 3) Working in partnership with others.

GARE provides resources in their tool kit that provide information to support implementation of a strategic plan focused on diversity, equity, and inclusion. These tools can be accessed at <https://www.racialequalityalliance.org>

*Advancing Racial Equity and Transforming Government: A Resource Guide to put Ideas into Action.* Julie Nelson, Lauren Spokane, Lauren Ross, and Nan Deng (2015)

*Public Sector Jobs: Opportunities for Advancing Racial Equity.* Julie Nelson and Syreeta Tyrell (2015)

*Racial Equity Toolkit: An Opportunity to Operationalize Equity.* Julie Nelson, Director, Government Alliance on Race and Equity. Lisa Brooks, University of Washington School of Social Work (2016)

*Contracting for Equity Best Local Government Practices that Advance Racial Equity in Government Contracting and Procurement.* Tim Lohrentz (2015)

*Racial Equity Action Plans: A How-To Manual.* Ryan Curren, Julie Nelson, Dwayne S. Marsh, Simran Noor, and Nora Liu (2016)

*Racial Equity: Getting to Results.* Erica Bernabei (2017)

**GARE also provides training and networking opportunities as well as written documents.**

## Reading List for Individual Use

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The reading list provided below was developed for individuals to gain understanding and appreciation of diversity, equity, and inclusion issues in our society. Hopefully, the DEI Reading List will support individual efforts to increase their knowledge and understanding of DEI issues.

The reading list is not intended to be a comprehensive bibliography of diversity, equity, and inclusion topics. Books on the DEI Reading List are written for reading by general, non-specialist audiences. The authors of these books are diverse as a group, and efforts have been made to provide different voices and perspectives on any single issue.

This list was developed by utilizing the reading lists that were created by other entities and available online. The presence of a book on this list does not mean that it is endorsed by Kairo Communications, but rather is listed to provide a variety of resources, to provide insight, and to generate discussion and debate. Each reader should form their own opinion about the information.

Ahmed, Sara. *On Being Included: Racism and Diversity in Institutional Life*. Duke University Press Books (2012)

Anderson, Carol. *White Rage: The Unspoken Truth of Our Racial Divide*. (2017)

Brown, Brené. *Dare To Lead: Brave Work. Tough Conversations. Whole Hearts*. Random House; First Edition (2018)

Catlin, Karen. *Better Allies: Everyday Actions to Create Inclusive, Engaging Workplaces*. Karen Catlin Consulting (2019)

DiAngelo, Robin. *White Fragility. Why It's So Hard for White People to Talk About Racism*. Beacon Press; Reprint edition (2018).

Dyson, Michael Eric. *Come Hell or High Water* (2007)

Guo, Winona, Vulchi, Priya. *Tell Me Who You Are: Sharing Our Stories of Race, Culture, & Identity*. TarcherPerigee (2019)

Hong, Cathy Park. *Minor Feelings: An Asian American Reckoning*.

Jana, Tiffany and Freeman, Matthew. *Overcoming Bias: Building Authentic Relationships across Differences*. Berrett-Koehler Publishers (2016)

Jana, Tiffany and Diaz Mejias, Ashley. *Erasing Institutional Bias: How to Create Systemic Change for Organizational Inclusion*. Berrett-Koehler Publishers (2018)

Kendi, Ibram X. *How To Be An Antiracist*.

Lee, Amy., Poch, Robert., O'Brien, Mary Katherine., Solheim, Catherine., *Teaching Interculturally: A Framework for Integrating Disciplinary Knowledge and Intercultural Development*. Stylus Publishing (2017)

McGhee, Heather. *The Sum of Us: What Racism Costs Everyone and How We Can Prosper Together*.

Mooney, Jonathan. *The Short Bus: A Journey Beyond Normal*. Holt Books (2004).

Myers, Verna A. *What if I Say the Wrong Thing? 25 Habits for Culturally Effective People*. American Bar Association, 1st Edition (2014)

Noble, Safiya. *Algorithms of Oppression: How Search Engines Reinforce Racism*. NYU Press (2018)

Norwood, Kimberly Jade. *Color Matters: Skin Tone Bias and the Myth of a Postracial America*. Routledge (2013).

Oluo, Ijeoma. *So, You Want to Talk About Race*. Seal Press (2018)

Page, Scott E. Page, *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*. Princeton University Press (2008).

Singleton, Glenn E. *Courageous Conversations about Race: A Field Guide for Achieving Equity in Schools and Beyond*.

Steele, Claude M. *Whistling Vivaldi: How Stereotypes Affect Us and What We Can Do*. W. W. Norton & Company; Reprint edition (2011)

Tatum, Beverly Daniel. *Why Are All the Black Kids Sitting Together in the Cafeteria*. Basic Books (2003)

Wood, Zachary R. *Uncensored: My Life and Uncomfortable Conversations at the Intersection of Black and White America*. Dutton (2018)

## Videos

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- 13th (Netflix)
- Asian Americans (PBS, May 2020)
- Crip Camp (Netflix)
- How Racism Makes Us Sick (TED Talk, November 2016)
- I Am Not Your Negro (Kanopy, Netflix)
- Promoting the Health and Well-being of Children in Immigrant Families in the Post-Pandemic Economic Recovery (The National Academies of Sciences, Engineering, and Medicine, April 2021)
- RACE – The Power of an Illusion: How the Racial Wealth Gap Was Created (California Newsreel)
- Stop AAPI Hate: Towards Prevention and Solidarity (Act to Change, YouTube, March 2021)
- Teach Us All - Segregation and Education in the United States (Kanopy)
- What I Hear When You Say: Model Minority (PBS, March 2017)

# Glossary of Terms

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## **Anti-Black Racism**

Any attitude, behavior, practice, or policy that explicitly or implicitly reflects the belief that Black people are inferior to another racial group. Anti-Black racism is reflected in interpersonal, institutional, and systemic levels of racism and is a function of White supremacy.

## **Anti-Racism**

Active process of identifying and challenging racism, by changing systems, organizational structures, policies and practices, and attitudes, to redistribute power in an equitable manner.

## **Bias**

Prejudice toward one group and its members relative to another group.

## **Contracting Equity**

Investments in contracting, consulting, and procurement should benefit the communities a jurisdiction serves, proportionate to the jurisdiction's demographics.

## **Color-Blind Racial Ideology**

The belief that people should be regarded and treated as equally as possible, without regard to race or ethnicity. While a color-blind racial ideology may seem to be a pathway to achieve equity, in reality it invalidates the importance of peoples' culture; ignores the manifestations of racist policies which preserves the ongoing processes that maintain racial and ethnic stratification in social institutions..

## **Cultural Competence**

The ability to understand, communicate with, and effectively interact with people across cultures. Grounded in the respect and appreciation of cultural differences, cultural competence is demonstrated in the attitudes, behaviors, practices, and policies of people, organizations, and systems.

## **Culture**

The languages, customs, beliefs, rules, arts, knowledge, and collective identities and memories developed by members of all social groups that make their social environments meaningful.

## **Discrimination**

The unequal treatment of members of various groups based on race, ethnicity, gender, gender expression, socioeconomic class, sexual orientation, physical or mental ability, religion, citizenship status, a combination of those identified, and/or other categories. See Racism.

## **Equality**

The effort to treat everyone the same or to ensure that everyone has access to the same opportunities. However, only working to achieve equality ignores historical and structural factors that benefit some social groups and disadvantage other social groups in ways that create differential starting points. See Racial Equity; see Justice.

## **Equity**

The effort to provide different levels of support based on an individual's or group's needs in order to achieve fairness in outcomes. Working to achieve equity acknowledges unequal starting places and the need to correct the imbalance. See Racial Equity; see Justice.

## **Ethnicity**

Denotes groups that share a common identity-based ancestry, language, or culture. It is often based on religion, beliefs, and customs as well as memories of migration or colonization.

## **Explicit Bias**

Biases that people are aware of and that operate consciously. They are expressed directly.

## **Implicit Bias**

A belief or attitude that affects our understanding, decision, and actions, People are not usually aware of these biases that operate at the subconscious level. Implicit bias is usually expressed indirectly.

**Inclusion**

A state of belonging, when persons of different backgrounds and identities are valued, integrated, and welcomed equitably as decision-makers and collaborators. Inclusion involves people being given the opportunity to grow and feel/know they belong. Diversity efforts alone do not create inclusive environments. Inclusion involves a sense of coming as you are and being accepted, rather than feeling the need to assimilate.

**Indigenous Decolonization**

The repatriation of Indigenous land and life, as well as the ongoing theoretical and political processes used to contest and reframe narratives about Indigenous community histories and the effects of colonial expansion, genocide, and cultural assimilation. Indigenous people engaged in decolonization work adopts a critical stance towards White, western-centric practices and discourse and seek to reposition knowledge within Indigenous cultural practices. This is commonly referred to as decolonization.

**Institutional/Systemic Racism**

The practices that perpetuate racial disparities, uphold White supremacy, and serve to the detriment and harm of persons of color and keep them in negative cycles. Institutional/systemic racism also refers to policies that generate different outcomes for persons of different race. These laws, policies, and practices are not necessarily explicit in mentioning any racial group but work to create advantages for White persons and disadvantages for people of color.

**Interpersonal Racism**

The racism that occurs between individuals. It is when someone consciously or unconsciously employs or acts upon on racist thoughts, in ways that perpetuate stereotypes and harms people of color.

**Intersectionality**

Coined by Professor Kimberlé Crenshaw in 1989, this term describes the ways in which race, class, gender, and other aspects of our identity “intersect” overlap and interact with one another, informing the way in which individuals simultaneously experience oppression and privilege in their daily lives interpersonally and systemically. Intersectionality promotes the idea that aspects of our identity do not work in a silo. Intersectionality, then, provides a basis for understanding how these individual identity markers work with one another.

**Marginalization**

The process that occurs when members of a dominant group relegate a particular group to the edge of society by not allowing them an active voice, identity, or place for the purpose of maintaining power.

**Othering**

The perception or placing of a person or a group outside and/or in opposition to what is considered to be the norm. Othering is based on a conscious or unconscious assumption that a certain identified group poses a threat to the favored or dominant group.

**People of Color**

Political or social (not biological) identity among and across groups of people that are racialized as non-White. The term “People of color” is used to acknowledge that many races experience racism in the U.S, and the term includes, but is not synonymous with, Black people.

**Power**

The ability to define, set, or change situations. Power can manifest as personal or collective self-determination. Power is the ability to influence others to believe, behave, or adopt values as those in power desire.

**Prejudice**

A preconceived opinion or assumption about something or someone rooted in stereotypes, rather than reason or fact, leading to unfavorable bias or hostility toward another person or group of people. Literally a “pre-judgement.”

**Psychological Safety**

People can be their best selves at work when they feel safe to be their full selves. This can be stressful because it’s vulnerable. Too often employees are punished for things like making a mistake, challenging the status quo, or offering feedback. These are the catalysts for innovation and often enhance decision making in organizations. They should be rewarded, not punished.

**Race**

A social and political construction—with no inherent genetic or biological basis—used by social institutions to arbitrarily categorize and divide groups of individuals based on physical appearance (particularly skin color), ancestry, cultural history, and ethnic classification.

The concept has been, and still is, used to justify the domination, exploitation, and violence against people who are racialized as non-White (see also: Racism).

**Racial Disparity**

An unequal outcome one racial group experiences as compared to the outcome for another racial group.

**Racial Disproportionality**

The underrepresentation or overrepresentation of a racial or ethnic group at a particular decision point, event, or circumstance, in comparison to the group’s percentage in the total population.

**Racial Equity**

Race is no longer a predictor of outcomes, leading to more just outcomes in policies, practices, attitudes, and cultural messages for all groups.

**Racism**

The systematic subjugation of members of targeted racial groups, who hold less socio-political power and/or are racialized as non-White, as means to uphold White supremacy. Racism differs from prejudice, hatred, or discrimination because it requires one racial group to have systematic power and superiority over other groups in society. Often, racism is supported and maintained, both implicitly and explicitly, by institutional structures and policies, cultural norms and values, and individual behaviors.

**Social Justice**

A process, not an outcome, which (1) seeks fair (re)distribution of resources, opportunities, and responsibilities; (2) challenges the roots of oppression and injustice; (3) empowers all people to exercise self-determination and realize their full potential; (4) and builds social solidarity and community capacity for collaborative action.

**Stereotype**

Exaggerated or distorted beliefs about the characteristics, attributes, and behaviors of individuals and communities that categorize individuals and communities into singular, pejorative terms.

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This glossary was compiled by a workgroup of the Center for the Study of Social Policy staff (CSSP). and also from a GARE resource booklet: Racial Equity Toolkit.

CITATION CSSP (2019). “Key Equity Terms and Concepts: A Glossary for Shared Understanding.” Washington, DC: Center for the Study of Social Policy. Available at: <https://cssp.org/resource/key-equity-terms-concepts/>. Sources for Definitions

Racial Equity Toolkit: A GARE Resource



## Contact:

Deborah C. Blanks, PhD  
Kairo Communications  
[info@kairocom.com](mailto:info@kairocom.com)  
414-807-3678  
Milwaukee, WI