

Strategy, Budget & Performance Office

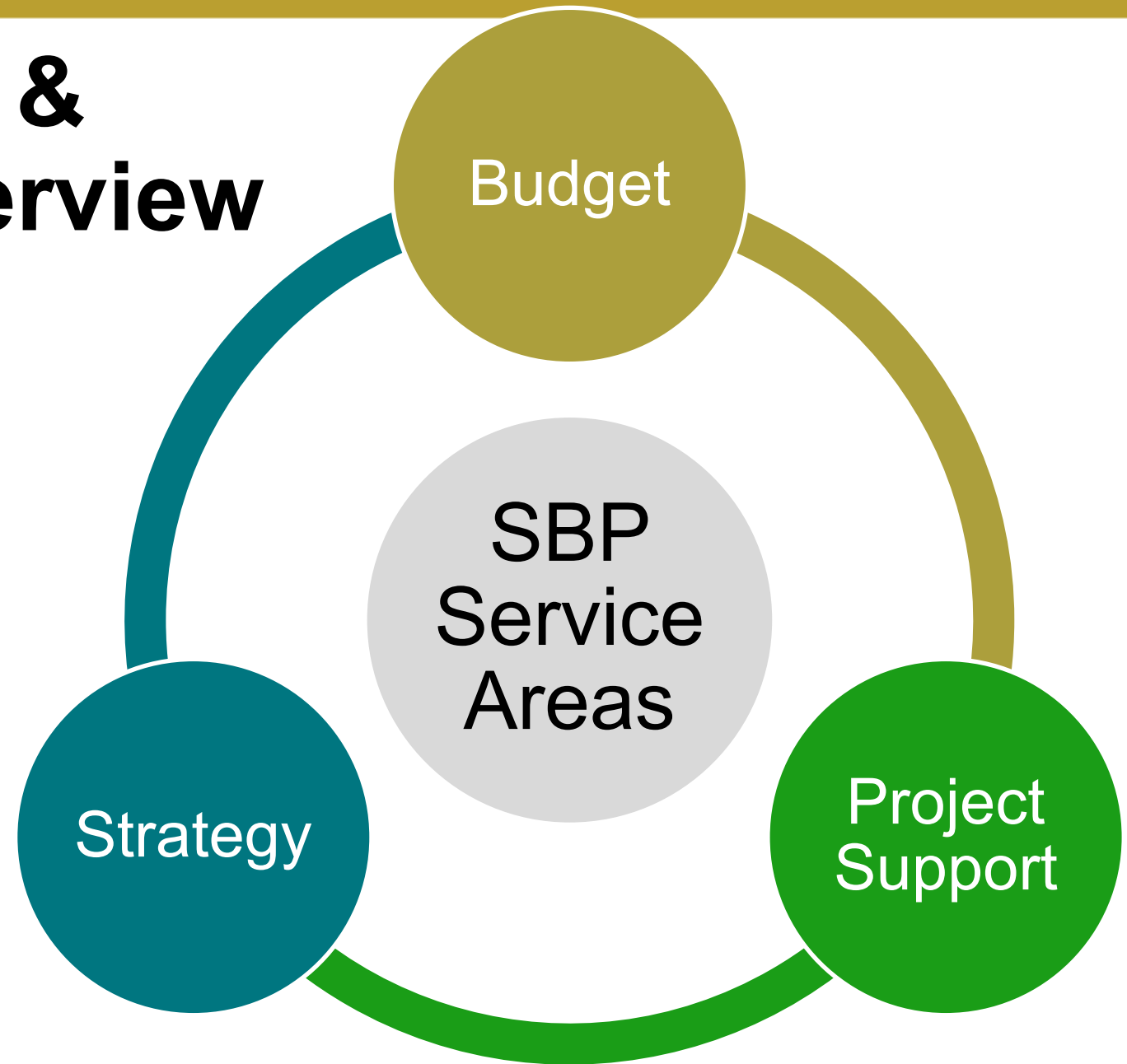
2023 Annual Report

May 2024



Strategy, Budget & Performance Overview

The Strategy, Budget & Performance Office was created in 2022 to further connect strategy and budget, while dedicating resource to project management support.



Strategy, Budget & Performance

Mission

We support Milwaukee County's success by driving equitable decisions and implementing innovative solutions.

Values

- Inclusion: We actively seek diverse perspectives when making decisions.
- Influence: We collectively use our power to positively impact our community.
- Integrity: We do the right thing even when no one is looking.
- Innovation: We find new and better ways to get things done.

SBP Office Service Areas

The Office of SBP works to strengthen county business practices and strategically align critical resources that advance the mission and improve Milwaukee County's fiscal health.

STRATEGY

The Strategy service area works with all departments and elected offices to drive meaningful progress within the county's strategic plan.

BUDGET

The Budget service area leads the development and implementation of the county's \$1.3 billion annual operating and capital budgets and supports the county's efforts toward achieving long-term financial sustainability.

PROJECT MANAGEMENT OFFICE

The PMO leads efforts to advance Milwaukee County's strategic plan by managing mission-driven projects through project management, grant development and internal communications support.

Top Three Office Goals

STRATEGY

1) Facilitate the development of strategic plans by every Milwaukee County department.

BUDGET

2) Support efforts to improve the County's fiscal sustainability, while also utilizing an equitable lens for budgeting. This goal is aligned with strategic objective 3B regarding fiscal health and sustainability.

PROJECT MANAGEMENT OFFICE

3) Milwaukee County will secure competitive grant revenue to improve our ability to invest upstream and support fiscal sustainability. By 12/31/23, Milwaukee County will submit 45 grant applications, totaling \$40M as measured by the PMO tracker per AMOP 11.01.

Goal Accomplishments



1) SBP achieved its goal by facilitating the development of strategic plans for every department within the County Executive's administration and supporting some elected officials (i.e., Sheriff).



2) Supported state legislation (and county approvals) for increased sales tax and shared revenue to provide additional resources for County services. Managed Racial Equity Budget Tool which provided 2024 budget funding using a racial equity lens.



3) The 2023 grant development goal was accomplished to that extent that \$70,522,538 was requested through 39 grant proposals, exceeding the anticipated amount of competitive grant funding pursued. The County maintains a 59% success rate on proposals awarded to-date.

Office Strategic Plan

- SBP developed a five-year strategic plan (2023-2027)
- Office leaders review a 2024 key performance indicator scorecard weekly to assess progress
- Staff developed and implement activities aligned to annual goals to track milestone achievements



The Office of Strategy, Budget and Performance :
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Milwaukee County as a whole:

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- **Innovation:** We find new and better way.

As an enterprise-wide office serving every part o
and Performance plays a role in advancing all nir

Create Intentional Inclusion

Reflect the full diversity of Milwaukee County at every level of county government.

Create and nurture an inclusive culture across Milwaukee County.

Increase the number of Milwaukee County contracts awarded to minority and women-owned businesses.

More specifically, the Office of Strategy, Budget and Performance delivers on its mission by advancing five overall goals, each of which align to one or more of Milwaukee County's overall strategic objectives. The table below shows the alignment between Strategy, Budget and Performance goals, Milwaukee County's strategic objectives, and the office's 2027 targets. It also

explains how we will know when we are successful at achieving each of the 2027 targets.

By establishing annual and quarterly goals that nest within this plan, each service area team checks in at regular intervals to assess its progress.

Office of Strategy, Budget & Performance Goals	Milwaukee County Strategic Objective Alignment	2027 Office of Strategy, Budget & Performance Targets	We will know we're successful when...
Lead Milwaukee County's Strategic Plan	All	Align all county services to the advancement of Milwaukee County's strategic plan.	We can explain clearly why every dollar we spend advances our strategy and we spend more money on strategic priorities.
		Centralize all performance measurements to the Milwaukee County Strategy Dashboard.	Performance measures for all services can be tracked on the strategy dashboard.
		Facilitate measurable progress in one or more social determinant of health (e.g. housing).	More residents live in quality, affordable housing in 2027 than in 2022.
Utilize an equitable lens for budgeting	2C: Racial Equity Lens 3A: Invest Upstream	A racial equity lens is applied to budget decisions at the countywide level.	Application of the Racial Equity Budget Tool and related processes become embedded into standard decision-making regarding the budget process.
Improve Milwaukee County's fiscal health	3B: Fiscal Health	Reduce the structural deficit.	Reduce the structural deficit compared to 2022.
		Increase revenue and resources that allow Milwaukee County to invest upstream.	Increase the amount of money invested into services that align to the determinants of health.
		Reduce the deferred capital infrastructure.	A balanced Milwaukee County funding policy is created addressing the annual capital infrastructure needs of core services with project management capacity.
Improve Milwaukee County operations and innovative practices	2A: Service Alignment 2B: Break Down Silos 3B: Fiscal Health	Maintain standard procedures for project management across Milwaukee County.	All departments use the same tools and processes to efficiently execute projects that advance Milwaukee County's vision.
		Improve processes by creating measurable efficiencies in the way Milwaukee County operates.	Reduce the number of steps needed to deliver Milwaukee County services.
Increase engagement of the workforce	2B: Break Down Silos	Maintain a high functioning internal communications unit.	Employees know what's going on throughout Milwaukee County -- both what we are doing and why we're doing it.

To learn more about Milwaukee County's journey toward racial equity, please visit county.milwaukee.gov/Vision.

To learn more about the Office of Strategy, Budget and Performance, please visit county.milwaukee.gov/EN/Strategy-Budget-and-Performance.



Strategy, Budget & Performance Goals

SBP Goals	County Alignment	2027 SBP Targets
Lead the County's Strategic Plan	All Strategic Objectives	Align all county services to the advancement of the County's strategic plan
		Centralize all county performance measurements to the Strategy Dashboard
		Facilitate measurable progress in one or more social determinant of health
Utilize an equitable lens for budgeting	2C: Racial Equity Lens, 3A: Invest Upstream	Apply a racial equity lens to budget decisions at the countywide level
Improve Milwaukee County's fiscal health	3B: Fiscal Health	Reduce the structural deficit
		Increase revenue and resources that allow Milwaukee County to invest upstream
		Reduce the deferred capital infrastructure
Improve County operations and innovative practices	2A: Service Alignment, 2B: Break Down Silos, 3B: Fiscal Health	Maintain standard procedures for project management across the county
		Improve processes by creating measurable efficiencies in the way Milwaukee County operates
Increase engagement of the workforce	2B: Break Down Silos	Maintain a high functioning internal communications unit

Strategic Planning



The Office of Strategy, Budget and Performance shares the vision of Milwaukee County as a whole, which is: "By achieving racial equity, Milwaukee is the healthiest county in Wisconsin."

The office's mission is "We support Milwaukee County's success by driving equitable decisions and implementing innovative solutions."

The Office of Strategy, Budget and Performance values align to those of Milwaukee County as a whole:

- **Inclusion:** We actively seek diverse perspectives when making decisions.
- **Influence:** We collectively use our power to positively impact our community.
- **Integrity:** We do the right thing even when no one is looking.
- **Innovation:** We find new and better ways to accomplish our goals.



As an enterprise-wide office serving every part of Milwaukee County government, the Office of Strategy, Budget and Performance plays a role in advancing all nine of Milwaukee County's strategic objectives.

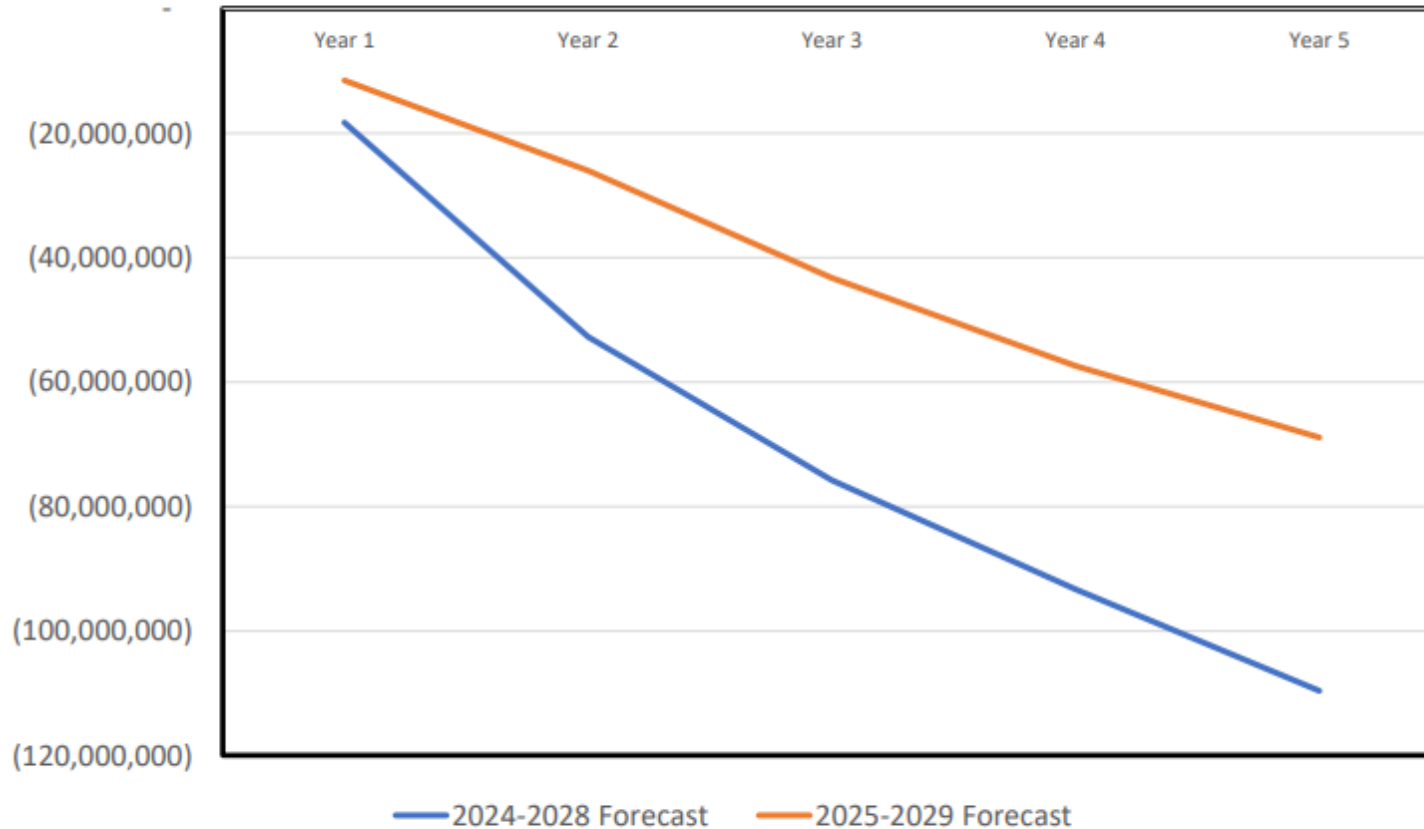
Create Intentional Inclusion	Bridge The Gap	Invest in Equity
Reflect the full diversity of Milwaukee County at every level of county government.	Determine what, where and how we deliver services based on the resolution of health disparities.	Invest "upstream" to address root causes of health disparities.
Create and nurture an inclusive culture across Milwaukee County.	Break down silos across Milwaukee County government to maximize access and quality of services offered.	Enhance Milwaukee County's fiscal health and sustainability.
Increase the number of Milwaukee County contracts awarded to minority and women-owned businesses.	Apply a racial equity lens to all decisions.	Dismantle barriers to diverse and inclusive communities.

- The SBP Strategy Service Area supported all cabinet departments in development of strategic plans that fit within the County's overall plans
- Continued support being provided to departments to leverage data to advance their plans
- Continued expansion of strategy dashboard and enterprise scorecards to measure progress



Structural Deficit Comparison

Structural Deficit Comparison (pre-post Act 12)



Source: Comptroller's five-year forecasts (2024-2028 vs 2025-2029)

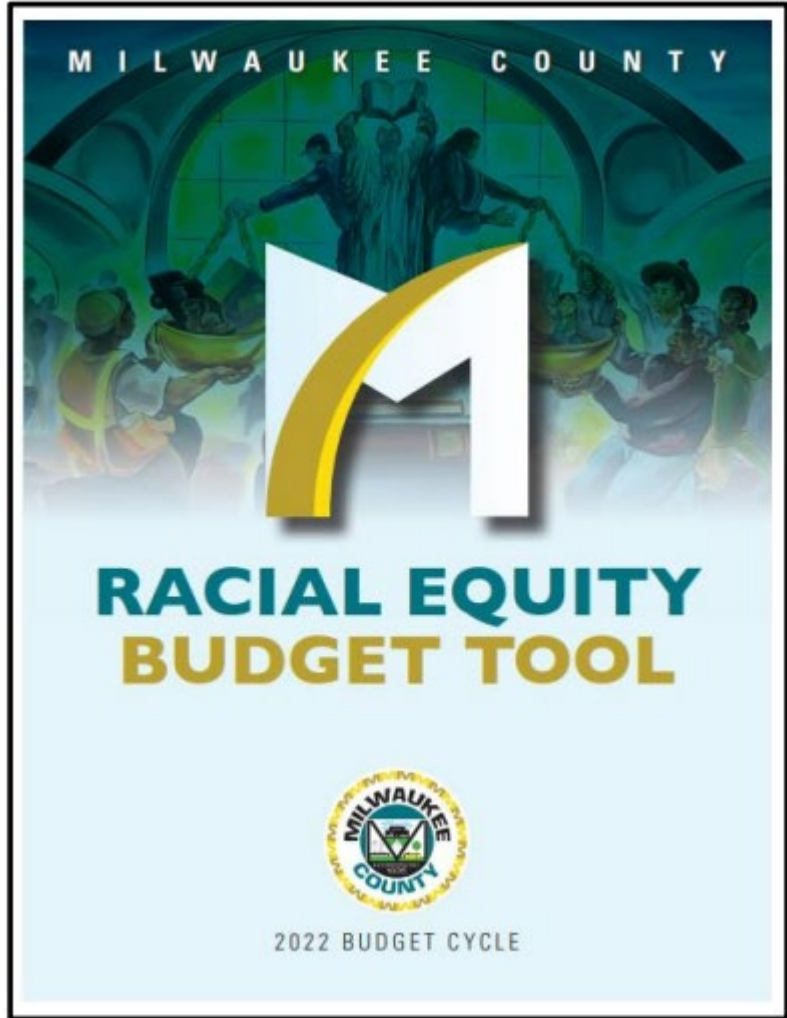


Transition to Wisconsin Retirement System (WRS)

- By enacting the 0.4% sales tax, the County must elect to join the Wisconsin Retirement System (WRS) for new employees (“soft close” of County ERS)
- New County employees will join WRS beginning 1/1/25
- This will result in closure of the County pension system which has been a major source of the County’s historical fiscal challenges
- Retirement Sustainability Taskforce, created in 2017, recommended this change to “ensure retirement security for future employees and long-term fiscal sustainability for the County”
- WRS considered one of the best managed pension plans in the Country due to its policies and procedures and fully funded status.



Racial Equity Budget Tool



- Continued utilization of REBT in 2024 budget process
- Designed to make intentional connections between strategic plan and budget
- Increased investment in REBT priorities reflected in 2024 budget



2023 Grant Development Activity

This data represents the collaborative work of eight Milwaukee County departments and dozens of subject matter project teams who focused their efforts to secure additional revenue and resource for Milwaukee County in 2023.

COMPETITIVE GRANT DEVELOPMENT

39

COMPETITIVE GRANTS

\$70,522,538

REQUESTED

Those efforts resulted in

\$19,618,053

REVENUE
SECURED

CONGRESSIONALLY DIRECTED SPENDING

13

PROJECT REQUESTS

\$56,464,658

REQUESTED

Those efforts resulted in

\$5,500,000

REVENUE
SECURED



Program Administration

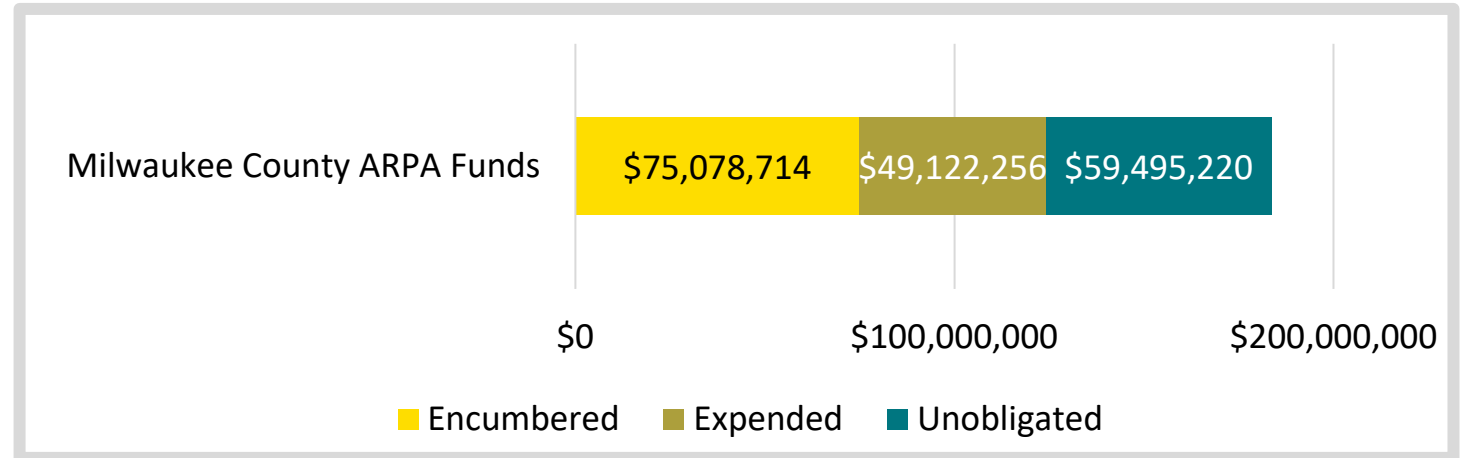
AMERICAN RESCUE PLAN ACT (ARPA)

- Monitoring spending and obligations
- Building the evaluation framework and systems
- Developed obligation strategy to ensure compliance with federal guidelines and best practices

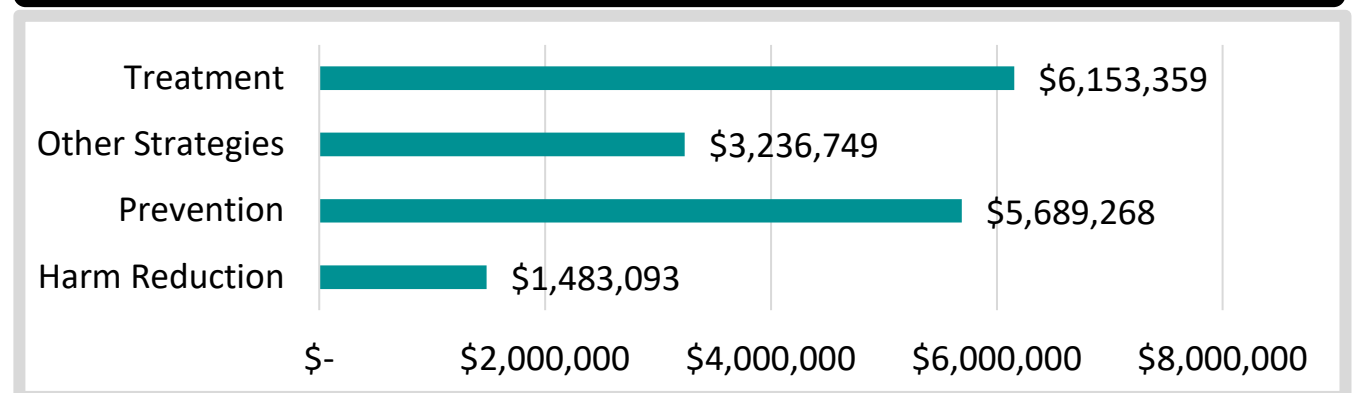
OPIOID SETTLEMENT FUNDS

- Developed strategic direction for use of funds
- Designed and implemented annual allocation process with cross-departmental workgroup
- Presented a 2023 Annual Report
- Monitoring spending and allocation steps

ARPA Project Obligation Progress



Opioid Settlement Allocations by Remediation Category





**MILWAUKEE
COUNTY**