

**COUNTY OF MILWAUKEE**  
Inter-Office Communication

Date: 4/16/2026  
To: Marcelia Nicholson, Chairwoman, Milwaukee County Board of Supervisors  
From: Liz Sumner, Milwaukee County Comptroller  
Subject: Office of the Comptroller 2025 Annual Report  
File Type: Informational Report

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This informational report provides a review of how the Milwaukee County Comptroller's Office set and achieved its 2025 goals.

**POLICY**

This report aligns to Chapter 108: Achieving Racial Equity & Health.

Milwaukee County Code of General Ordinances:	<a href="#">Chapter 108: Achieving Racial Equity &amp; Health</a>
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**ALIGNMENT TO STRATEGIC PLAN**

- 1A: Reflect the full diversity of the County at every level of County government
- 1B: Create and nurture an inclusive culture across County government
- 1C: Increase the number of County contracts awarded to minority and women-owned businesses
- 2A: Determine what, where, and how we deliver services to advance health equity
- 2B: Break down silos across County government to maximize access to and quality of services offered
- 2C: Apply a racial equity lens to all decisions
- 3A: Invest "upstream" to address root causes of health disparities
- 3B: Enhance the County's fiscal health and sustainability
- 3C: Dismantle barriers to diverse and inclusive communities

Alignment to the above strategic goals is articulated in responses to the questions below.

## **BODY**

**Please tell us about your progress on your Department/Office's top goals in 2025.** Please explain why they are "SMARTIE" goals (specific, measurable, achievable, realistic, timely, inclusive, and equitable) and how they align to the county's racial equity strategy.

- Goal 1: Beginning Q3 2024 with completion by the end of Q4 2025, the Milwaukee County Comptroller's Office will have developed a comprehensive strategic plan that is aligned with the County's long-term financial goals. The plan will include clear objectives, measurable goals, and specific timelines for implementation, ensuring enhanced operational efficiency and long-term fiscal sustainability for the County. The strategic plan will also address equity considerations, ensuring that the plan's outcomes are inclusive and benefit all stakeholders.
- Goal 2: By the end of 2025, we will enhance our office's public accountability, transparency, and decision support by issuing a comprehensive 5-year fiscal forecast and conducting an annual budget analysis, ensuring timely and accurate information is provided to stakeholders for informed decision-making.
  - By the end of Q4 2025, the Office of the Comptroller will continue to uphold high levels of public accountability, transparency, and decision support by issuing the annual 5-year fiscal forecast and presenting a comprehensive analysis of the 2026 Recommended Budget.
  - By the end of Q4 2026, the Comptroller's Research Services Staff will deliver a comprehensive analysis of the 2026 Recommended Budget to the County Board and the public. The presentation will be structured into four key sections, ensuring clarity and transparency in the budget's objectives and proposed changes.
- Goal 3: For fiscal year 2025, The Comptroller's Office will achieve the Government Finance Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting (COA) for our FY 2024 Annual Report, ensuring all necessary documentation and processes are in place for submission.

1. What key factors *enabled* progress toward accomplishing these goals?

- a. Goal 1: This goal was completed and was driven by several key factors that strengthened both planning and execution of the Office of the Comptroller's strategic plan.
  - i. An employee feedback survey in June 2025 played a critical role in informing the development of the strategic plan, ensuring that staff perspectives were incorporated into identifying priorities, challenges, and opportunities for improvement. This input helped ground the plan in

- operational realities while reinforcing a culture of inclusion, transparency and engagement.
- ii. In addition, a dedicated subgroup of employees was established in May of 2025 to lead strategic plan efforts, providing focused oversight and accountability for advancing key initiatives related to the development of the strategic plan. This group worked in coordination with leadership and the SBP strategic planning team to guide implementation and maintain alignment with organizational goals.
  - iii. A continuous feedback loop was also implemented throughout the process, allowing for ongoing evaluation, real-time adjustments, and sustained communication across teams, ultimately enabling steady progress and inclusion of all levels of employees in the creation of the strategic plan.
- b. Goal 2: Both reports were completed and delivered in accordance with the established timeline and presented to the Finance Committee of the County Board without delay. These reports are also made publicly available on the County website, ensuring transparency and accessibility for all stakeholders. [The Milwaukee County Comptroller & Audit Reports](#) are also accessible to the public, offering comprehensive insights into the County's financial status and operations.
- i. The accomplishment of delivering the 5-year forecast goal was enabled by a combination of strong internal coordination, clear timelines, and a continued commitment to data-driven analysis. Established processes for developing the annual 5-year fiscal forecast provided a solid foundation for the County to react accordingly in solving potential budgetary issues.
  - ii. The accomplishment of delivering the 2026 Recommended Budget analysis was completed and presented in a timely manner. Collaboration across divisions, led by the Research Services staff, organized the budget analysis into clearly defined sections, improved transparency, and made complex financial information more understandable for all stakeholders.
- c. Goal 3: For fiscal year 2025, The Comptroller's Office will achieve the Government Finance Officers Association (GFOA) Certificate of Achievement for Excellence in Financial Reporting (COA) for our FY 2024 Annual Report, ensuring all necessary documentation and processes are in place for submission.
- i. This goal was accomplished through well-established financial reporting processes and a strong foundation of technical expertise within the Comptroller's Office. Staff familiarity with Government Finance Officers Association (GFOA) requirements ensured that the FY 2024 Annual Report was prepared in alignment with the Certificate of Achievement for Excellence in Financial Reporting (COA) criteria. Clear internal timelines, thorough documentation practices, and early preparation all contributed to a smooth and timely submission process.

1. Develop Strategic Plan	2. Complete Five-year Fiscal Forecast and Annual Budget Analysis	3. COA in Excellence awarded
✓	✓	✓

2. What factors *hindered* progress toward accomplishing these goals? A few factors presented opportunities to adapt and strengthen our approach, ultimately supporting continued progress toward accomplishing these goals:
- a. First, competing staff priorities and limited capacity created pressure on timelines across strategic planning, financial reporting, and budget analysis efforts. This was mitigated by establishing dedicated teams and subgroups, ongoing communication between stakeholders, and prioritizing key deliverables, which improved coordination and ensured steady progress.
  - b. Ensuring consistent and meaningful stakeholder engagement through employee feedback and public-facing reporting required additional focus and dedication. Early gaps in participation and communication were addressed through the implementation of formal feedback mechanisms, including employee surveys and ongoing feedback loops, as well as more structured reporting formats.
3. If any goals are changing, please list those and briefly explain why. (Please put “N/A” if your goals will remain the same.)
- o Goal 1: With the successful completion and rollout of the strategic plan in September 2025, the focus of Goal 1 has shifted from development to execution. Efforts are now centered on advancing key performance indicators (KPIs) established within the plan by 2027, with dedicated teams responsible for driving progress, monitoring results, and ensuring alignment with strategic priorities. This transition emphasizes accountability and measurable outcomes, as progress is tracked against defined benchmarks and timelines. Ongoing use of feedback loops and performance data will support continuous improvement, ensuring the strategic plan remains a dynamic tool for enhancing operational efficiency, advancing equity goals, and achieving long-term fiscal sustainability.
  - o Goal 2: N/A except for the Fiscal Year.
  - o Goal 3: N/A except for the Fiscal Year.

**FISCAL EFFECT**

The report is informational only and there is no fiscal impact.

**VIRTUAL MEETING INVITES**

**PREPARED BY:**

James Moon, Office of the Comptroller, Deputy Comptroller

**APPROVED BY:**

A handwritten signature in black ink, appearing to read 'Liz Sumner', with a long horizontal flourish extending to the right.

Liz Sumner, Office of the Comptroller, Comptroller

**ATTACHMENTS:** Office of the Comptroller 2025 Annual Report Powerpoint

cc: Kelly Bablitch, Chief of Staff, Milwaukee County Board of Supervisors  
Janelle M. Jensen, Legislative Services Division Manager, Office of the County Clerk