MILWAUKEE COUNTY FISCAL NOTE FORM

DATE: November 14, 2025

Original Fiscal Note ☒

Substitute Fiscal Note ☐

SUBJECT: A request from the Strategy Director, Office of Strategy, Budget and Performance to execute a fee increase of $10,000 in 2026 for an amendment to the Professional Services Agreement with Berry Dunn for consultation services as part of the Milwaukee County Future State Project resulting in a Not to Exceed (NTE) contract value up to $409,500

FISCAL EFFECT:

☒ No Direct County Fiscal Impact

- ☐ Existing Staff Time Required

☒ Increase Operating Expenditures
(If checked, check one of two boxes below)

- ☒ Absorbed Within Agency's Budget
- ☐ Not Absorbed Within Agency's Budget

☐ Decrease Operating Expenditures

☐ Increase Operating Revenues

☐ Decrease Operating Revenues

☐ Increase Capital Expenditures

☐ Decrease Capital Expenditures

☐ Increase Capital Revenues

☐ Decrease Capital Revenues

☐ Use of contingent funds

Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.

	Expenditure or Revenue Category	Current Year	Subsequent Year
Operating Budget	Expenditure	$0	$10,000
	Revenue	$0	$10,000
	Net Cost	$0	$0
Capital Improvement Budget	Expenditure	$0	$0
	Revenue	$0	$0
	Net Cost	$0	$0

DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated.[1] If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

A. The 2024 Adopted Budget included $400,000 for the Future State Study. File 24-534 included authorization to execute a Professional Services Agreement with Berry Dunn not to exceed $400,000 for this purpose. This file requests authorization to execute a fee increase of $10,000 for an amendment to the Professional Services Agreement with Berry Dunn for consultation services as part of the Milwaukee County Future State Project resulting in a Not to Exceed (NTE) contract value up to $409,500. The Milwaukee County Future State Project is an opportunity to reimagine Milwaukee County's service portfolio, organizational structure, and interdepartmental processes. Consultant services include conducting an analysis of existing services in alignment with the county's strategic plan and vision and developing recommendations for prioritization and long term-structure of County services.
B. Approval of this resolution would allocate an additional $10,000 approved in the 2026 Adopted Budget to execute a Professional Services Agreement with Berry Dunn.
C. No budgetary impact is anticipated with the proposed action as funds are included in the 2026 Budget.
D. No assumptions or interpretations were made.

Department/Prepared By: Claire Miller

Authorized Signature JOSEPH LAMERS

Did DAS-Fiscal Staff Review? ☐ Yes ☒ No

[1] If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.
[2] Community Business Development Partners' review is required on all professional service and public work construction contracts.

Did CBDP Review? ☐ Yes ☐ No ☒ Not Required