MILWAUKEE COUNTY FISCAL NOTE FORM

DATE: November 14, 2025

Original Fiscal Note ☒

Substitute Fiscal Note ☐

SUBJECT: A report from the Executive Director, Department of Health and Human Services, requesting authorization to execute 2026 purchase of service contracts for the Area Agency on Aging (AAA)

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	$1,439,462
	Revenue	$0	$1,439,462
	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. Approval of this report authorizes the Executive Director of the Department of Health and Human Services (DHHS) to execute purchase of service contracts through the Area Agency on Aging (AAA) for the period of January 1, 2026, through December 31, 2026. The contract with Serving Older Adults of Southeast Wisconsin, Inc. is effective January 1 to February 28, 2026.

B. Approval of this report authorizes the Executive Director of DHHS to execute purchase of service contracts totaling $1,439,462 with various vendors for a variety of supports and services for older adults in alignment with the 2025-2027 Area Aging Plan approved by the Commission on Aging.

C. The cost of the purchase of service contracts is offset by the following fund sources: Older Americans Act Titles III-B and IIIC, Wis. Stat. 85.21 funds, Senior Community Services Program, Wisconsin Elder Benefit Specialist General Purpose Revenue (GPR), Wisconsin Elder Benefit Specialist Legal Services GPR, State Health Insurance Program, and State Prescription Assistance Program, Basic County Allocation and county tax levy as anticipated in the 2026 Budget. This request includes only the 2026 purchase of service contracts that were not included in the 2026 Budget, as these contracts were undergoing the Request for Proposals (RFP) process at the time the budget was submitted. All other AAA annual contracts were included in the initial budget request and approved through that process.

D. No assumptions or interpretations were made.

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[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.

Department/Prepared By: Lottie B. Maxwell-Mitchell, Sr. Budget and Management Analyst, DHHS

Authorized Signature *Shakita LaGrant-McClain*

Did DAS-Fiscal Staff Review? ☐ Yes ☒ No

Did CBDP Review?[2] ☐ Yes ☐ No ☒ Not Required