

**COUNTY OF MILWAUKEE**  
Inter-Office Communication

Date: 4/17/2025

To: Marcelia Nicholson, Chairwoman, Milwaukee County Board of Supervisors

From: Joe Lamers, Director of the Office of Strategy, Budget & Performance (SBP)

Subject: Office of Strategy, Budget, & Performance 2024 Annual Report

File Type: Informational Report

*JOSEPH LAMERS*

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This informational report provides a report on how SBP set and achieved its 2024 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**

1. Please submit your Scorecard Report along with this report, to show progress on your Department/Office's top goals in 2024. If you would like to add any additional information about the extent to which you accomplished your goals, please do so here.

The Office of Strategy, Budget and Performance (SBP) was created in 2022 to further align strategic planning and budgeting efforts to enable Milwaukee County to achieve its long-term vision. The office leads the strategic plan, uses an equitable lens for budgeting, and implements effective practices for continuous improvement, grant development, internal communications, and project management. These activities support Milwaukee County's ability to provide high quality services for the residents of Milwaukee County.

SBP works to strengthen county business practices and strategically align critical resources that advance the mission and improve Milwaukee County's fiscal health. The office is structured to support departments across the organization through the following three service areas:

- **Strategy:** The Strategy service area works with all departments and elected offices to drive meaningful progress within the county's strategic plan. In addition, this service area manages the County's Strategy Dashboard, oversees data governance, plans and facilitates key leadership meetings, and manages the County's performance measurement processes.
- **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. Milwaukee County strives to be a fiscally healthy organization that prioritizes investments towards strategic plan priorities.
- **Project Management Office (PMO):** The PMO leads efforts to advance Milwaukee County's strategic plan by managing mission-driven projects. The team integrates project management methods and support for county departments in the follow service areas:
  - Project management (including continuous improvement, priority, and strategy initiatives)
  - Competitive grant development (including congressionally directed spending and state budget requests)
  - Internal communications (including brand management and digital experiences)
  - Programs (including American Rescue Plan Act, Opioid Settlement Funds, Youth Commission, and the Administrative Manual of Operating Procedures), and
  - Policy support (new in 2025).

SBP developed and monitors a five-year strategic plan and reviews key performance indicators in the form of a scorecard to ensure progress on annual goals aligned to the strategic plan, as represented in this report.

Additional notes on the top five goals represented on the attached Scorecard Report are provided below.

**20 Completed Projects:**

The PMO supports County departments by providing additional capacity to execute strategic solutions for their most pressing project needs. A tiered system of support is used to effectively meet the needs of Milwaukee County departments. In 2024, the PMO carried out and concluded 20 projects requiring continuous improvement or general project management assistance. The office takes on short term and multi-year projects that require collaborative (tier two) or lead (tier three) project management support and tools. Projects concluded in 2024 resulted in outcomes such as:

- Improvements in contract compliance practices, transitions of elected officials, record dispositioning, audit compliance;
- Establishment of the Future State contract, Policy Strategy Team, homeowner displacement dashboard; and
- Transitions of Child Support Services into the Department of Health & Human Services and correctional food services vendors across correctional facilities.

**10% Increase in Competitive Grant Submissions:**

The grant development team within the PMO worked to pursue competitive grant funds for Milwaukee County through targeted grant development support for County departments. The 2024 grant development goal was accomplished to the extent that \$106,429,121 was requested through 45 grant proposals, exceeding the anticipated number of competitive grant proposals submitted.

As of April 15, 2025, 26 of the applications submitted in 2024 have been awarded, totaling \$23,222,318 in grant revenue. This is a 58% success rate for proposals submitted and then awarded to date. There are 6 grant proposals pending award which total \$26,696,799.

Since inception in January 2021, the grant development team in collaboration with Milwaukee County departments supported the accumulation of \$136,115,141 in competitive grant awards through April 2025.

In 2024, the PMO also facilitated requests for Congressionally Directed Spending (CDS) through local legislative offices for a total of 10 projects, amounting to \$47,764,470. Three projects, totaling \$3,000,000, aimed at supporting the clean diesel bus purchase initiative, affordable housing, and community center upgrades, moved forward for approval into law. Unfortunately, all CDS requests were recently removed from the 2025 federal budget, halting the advancement of these projects.

**60% of Requested Capital Projects Adopted:**

The percentage of the Adopted Projects dropped from 45% (2024 Adopted Capital Budget) to 33% (2025 Adopted Capital Budget). This is primarily due to the following 2024 Adopted Capital funding items:

- Bonding cap (\$47.2 million) was exceeded by \$6.4 million (13.5% over the cap), allowing for more capital requests to be funded.

- The new (0.4 % local option) Sales Tax allowed for a (2024) one-time increase in freed-up tax levy to provide additional funding for non-bond eligible projects (of approximately \$10.4 million).
- The 2025 Capital Budget included funding of \$6.3 million for Underwood Creek Parkway Road Replacement, \$3.8 million for South Shore Breakwater North Section, \$7.6 million for Highway and Bridge projects, \$11.6 million for Fleet and Bus Replacements. These and other large sized projects consumed a large portion of the county's bonding cap, which limits the overall amount of projects that could be funded.

### **Positive Trend in Budget Forecast:**

The 2026-2030 Five-Year Forecast from the Office of the Comptroller shows a projected budget gap of \$47 million. The main drivers in this increase are an increase in expenditure growth rate, additional wage/overtime costs, increasing costs of employee benefits, limitations on revenue generating options, and expiring federal funding.

### **Every Department within the Administration has an approved Scorecard Report:**

All Departments within the Administration submitted a Scorecard Report in July 2024, with their 2025 budgets. These reports visualize approximately five key measures tied to each Department's strategic goals and will continue to be used annually to transparently communicate progress. In addition to being submitted with the budget, the reports will also be paired with the Annual Reports memo, as done here.

Strategy, Budget & Performance (SBP) is currently piloting an enterprise-wide data collection system with a dynamic Scorecard tool to enhance the tracking and reporting of performance measures.

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

The consistent and strong executive sponsorship of the County Board for advancing strategic planning and performance measurement greatly enhance SBP's ability to support departments across the County Executive's administration to develop scorecards to track progress toward their department plans.

The PMO grant development team expanded in 2024 to include a Grant & Project Analyst position to support the ongoing development needs of the organization. The team built a stronger relationship with the Government Affairs Department to forecast and solicit partner support at the state and federal levels for competitive opportunities.

Also new in 2024, the PMO established two Community of Practice (CoP), convening professionals on a quarterly basis from across the county to solution around common challenges, share tools and resources, and create a network of individuals with similar responsibilities. The two CoPs focus on Grant Development and Project Management and enable progress in both service areas while building workforce skills across departments.

## **3. What key factors *hindered* progress toward accomplishing these goals?**

The lack of dedicated strategic planning and performance measurement professionals across especially the larger departments created additional, but surmountable, challenges to developing scorecards for all County services.

The lack of a fully integrated data governance framework created challenges for department strategic planning and scorecard development, but the hiring of a Data Governance Lead in 2025 should help to address this challenge.

Available federal grant opportunities reached a pinnacle by 2022 and peaked again in 2024 during the federal election cycle. It is expected that discretionary grant funding will be sparse in 2025 as the new federal administration transitions and states react to new funding dynamics. There is ongoing uncertainty related to current and future grant programs that is being monitored by the PMO and Government Affairs Department.

Factors that led to an increase in the projected budget gap include increasing overtime hours/costs, an increase in the average employee salary, expiration of one-time savings that supported the 2025 adopted budget, and uncertainty with sales tax projections.

In 2024, the PMO took on a lead project management role in the Investing in Justice: Courthouse Complex Planning project, aiming to replace the Public Safety Building with a new criminal courthouse. Ten SBP employees play a role in one or more project work groups. Specific to the PMO, four individuals play leading roles, which hampers the capacity of the office. While the PMO was able to meet its 2024 goal for project completion, the office is working strategically to balance project requests with the project manager resources available.

4. If any goals are changing, please list your Department/Office goals for 2025. (Please put "N/A" if your goals will remain the same.)

Click or tap here to enter text.

### **FISCAL EFFECT**

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

### **VIRTUAL MEETING INVITES**

Isaac Rowlett, Strategy Director, Office of Strategy, Budget and Performance  
Dan Laurila, Operating Budget Director, Office of Strategy, Budget and Performance  
Vince Masterson, Capital Budget Coordinator, Office of Strategy, Budget and Performance  
Ashley Adsit, Director of Project & Performance Management, Office of Strategy, Budget and Performance

### **PREPARED BY:**

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Dan Laurila, Operating Budget Director, Office of Strategy, Budget and Performance  
Vince Masterson, Capital Budget Coordinator, Office of Strategy, Budget and

Performance

Ashley Adsit, Director of Project & Performance Management, Office of Strategy,  
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**APPROVED BY:**

Joseph Lamers, Director, Office of Strategy, Budget and Performance

**ATTACHMENTS:**

Scorecard Report

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