

**COUNTY OF MILWAUKEE**  
Inter-Office Communication

Date: April 19, 2024

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

From: Scott F. Brown, Acting Corporation Counsel

Subject: The Office of Corporation Counsel 2023 Annual Report

File Type: Informational Report

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This informational report provides a report on how the Office of Corporation Counsel set and achieved its 2023 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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**BACKGROUND**

[File 22-104](#) amends Chapter 108 to require that “annually, by April 30 of each year or sooner, each Milwaukee County department leader and/or their designee(s) shall provide a written and oral report outlining their year-end results to a Milwaukee County Board of Supervisors committee. The reports shall, at a minimum:

- (a) Indicate the year-end goals the department set in the prior year
- (b) Share the rationale and relevance of the department’s performance metrics (i.e. explaining why they are “SMART” goals (specific, measurable, achievable, realistic, timely, and extending) and how they align to the county’s racial equity strategy, if applicable)
- (c) Report the department’s year-end results relating to the goals it had set, and
- (d) Provide a thorough analysis clearly articulating why goals were significantly exceeded, met, or not met.
- (e) Explain the department’s progress in creating a departmental-level strategic plan that aligns to the countywide strategic plan and provide an update about future plans to revise and enhance the departmental-level plan in the year ahead.”

## **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 objectives is articulated in response to the questions below.

## **BODY**

The OCC is a valued, inclusive partner to County clients and the community through:

- Encouraging decision making with an eye toward equity and inclusion.
  - Providing outstanding client service that is client-focused, accurate, clear, pragmatic, and sounding in the highest standards of integrity and attorney ethics.
  - Reducing the County’s overall legal risk.
  - Implementing best-in-class policies and procedures.
  - Helping clients achieve operational efficiency.
  - Establishing internal priorities that drive resource efficient allocation and meet client expectations.
  - Managing our talent pool to ensure effective and efficient client service, while recognizing and supporting the excellence and integrity of our people.
1. What were the top 3 goals of your department/office in 2023? 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:** Technological modernization of OCC in cooperation with IMSD – focus on optimizing utilization of existing tools and assessing whether there is a need for additional new tools/platforms. The purposes of the new system include:
  - Systemize workflow intake processes/forms to record vital data concerning each matter handled by the OCC.
  - Implement a comprehensive time keeping and workflow management system, to enable:
    1. Quantitative risk and ROI reporting to County Executive and Board (both point in time and over time);
    2. Quantitative key performance indicators or KPIs;
    3. Practical efficiencies using case and document management software including the ability to effectively, accurately process electronically-stored document requests whether in the context of litigation or open records requests;
    4. Maximally efficient time allocation based upon a case/project's impact on mission, community trust, operations, precedent with courts or stakeholders, and finances;
    5. Better collaboration with County insurers and Risk Management; and
    6. OCC team members to better manage hybrid work environment, professional development, and client relationships and education.

This goal aligns with the County's Strategic Plan because it (1) increases the capacity of the OCC to assess internal data so that resources are appropriately and effectively allocated ("to advance health equity (2A); (2) assists in breaking down silos across County government to maximize access to and quality of services offered, because it will provide for easy intake and tracking of requests from clients and stakeholders across the County and the public, and will track each request to ensure a timely response (2B); (3) will allow the OCC to evaluate its resource allocation with an eye toward applying a racial equity lens to all decisions (2C); and invest "upstream" to address root causes of health disparities, by freeing up resources to focus on impact litigation and education and training, among other things; (3A). In addition, this goal will ultimately enhance the County's fiscal health and sustainability because it will result in creating data to assess and remove inefficiencies (3B).

- **Goal 2:** Dedicate additional internal resources to provide more accessible mental health services for Milwaukee County and consistent, effective education and training during the current mental health crises and beyond.

This goal aligns with the County's Strategic Plan because it (1) reflects the full diversity of the County at every level of County government as we must work collaboratively across departments and with members of the public of all backgrounds (1A); (2) directly creates and nurtures an inclusive culture across County government (1B); (3) addresses what, where, and how we deliver services to advance health equity (2A); (4) by requiring collaboration across departments, with courts, and with external stakeholders, breaks down silos across County government to maximize access to and quality of mental health services offered (2B); (4) applies a racial equity lens to all decisions (2C); (5) includes direct investment "upstream" to address root causes of mental health disparities (3A); (6) ultimately enhances the County's fiscal health and sustainability (3B); and (7) dismantles barriers to diverse and inclusive communities most particularly those who suffer with mental illness and their loved ones (3C).

- **Goal 3: Improve organizational strength** by implementing effective succession planning that ensures retention of institutional knowledge and seamless transition when team members depart. Expand on existing training opportunities for team members to promote career development. Develop a consistent hiring, onboarding, and training process that recruit and the best talent available and facilitates success job performance, improvement, and advancement.

This goal aligns with the County's Strategic Plan because it will (1) reflect the full diversity of the County at every level of County government (1A); (2) create and nurture an inclusive culture across County government (1B); (3) apply a racial equity lens to all decisions in staffing, hiring, onboarding, training and knowledge transfer (2C); (4) enhance the County's fiscal health and sustainability (3B); and (5) will dismantle barriers to diverse and inclusive communities (3C).

2. To what extent were these goals accomplished in 2023? Please explain.

- **Goal 1:**
  - Digital intake platform for three party petitions is in its beta testing phase.
  - Internal workgroup has met regularly and conducted due diligence and analysis to identify all technological needs, prioritized the same and provided this information to IMSD and Baker Tilly.
  - Internal workgroup began testing and expanding the capabilities of CLIO (OCC's existing case management software), including opening test files for OCC's various practice areas.
  - Secured ARPA funds for a technological transformation.
  - Partnered with IMSD to evaluate all OCC technological needs, goals and identify the best solutions.

- Updated OCC website.
  - Certain documents have been transitioned to SharePoint for archival and document management purposes.
  - Conducted training sessions for staff on a variety of existing technological resources.
  - Transitioned away from traditional research resources to web based platforms.
  - Enhanced time tracking for purposes of evaluating efficiency.
  - Scheduled and attended demos for various software products that could potentially improve OCC's operations.
- **Goal 2:**
- Added two new paralegals and one new attorney to the Three-Party Petition ("TPP") team.
  - Added bi-weekly meetings for TPP paralegals to collaborate and monitor cases.
  - Updated our outward facing forms, brochures, website, etc. with updated information to reflect the BHD closure.
  - Changed internal processing methods to make (having an intake person, case assignments, requiring 3 forms per case).
  - Collaborated with other county departments to coordinate mental health related initiatives.
  - Worked throughout the year on developing the new TPP intake system.
  - Created and implemented a comprehensive mock trial to prepare County employees for testifying in court.
  - Created a new CCAP form regarding administration of involuntary psychotropic medication which was adopted and published.
  - Assisted courts with developing processes and procedures relating to information sharing and mental evaluations for youth in detention.
  - OCC attorneys and paralegals gave multiple presentation internally and externally including the Prevent Child Abuse Wisconsin conference regarding Voluntary and Involuntary Mental Health Services for youth; Wisconsin Association for County Corporation Counsels re. Chapter 980; Basics in Community Treatment; and many others.

- ACC Lisa Procaccio was awarded the Outstanding Young Lawyer of the Year by the Wisconsin State Bar's Young Lawyer Division, specifically nominated for the mental health work, particularly in relation to stakeholder collaboration and system access.
- **Goal 3:**
- Former Corporation Counsel Daun trained Acting Corporation Counsel, Scott Brown (her statutory successor), on all of her job duties in the event that she departed position. Mr. Brown succeeded Corporation Counsel Daun in early 2024 and due to effective knowledge transfer he has been able to seamlessly move into her role.
  - Deputies have identified an ACC (or more) as potential successors and train them on an ongoing basis on performance of Deputy level duties should that Deputy depart OCC.
  - ACCs have identified backup ACCs to perform specific job duties so that we have redundancies in skill sets for most positions.
  - Convened an internal committee to focus on succession planning for the office.
  - The team has developed an onboarding schedule and ACC West is developing a consistent hiring process for all positions in OCC.
  - Conducted internal trainings on relevant practice areas.

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

The primary factors that enabled progress towards accomplishment of these goals are leadership, planning, and systems of accountability. The leadership team is committed to advancing these goals and have cultivated buy in from staff through direct engagement. This has entailed staff meetings where these items were discussed at length and embryonic ideas were clarified with input from staff. Once the goals were solidified by consensus, we engaged in a rigorous planning process that involved identifying appropriate staff to either join teams or take point on each particular initiative. Next, a schedule of meetings was set to discuss and develop plans of actions. Individuals and teams have items actions and are held accountable by deadlines and regular check-ins with team members.

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

The factors that hindered progress were availability of staff time to dedicate to particular initiatives and overcoming institutional inertia. These are large goals that are time intensive undertakings that are additional work for us all on top of our basic job

duties. Creating time to actually do the work of bringing these goals to fruition requires doing our jobs more efficiently so that we can dedicate time to advancing these goals. Change is difficult for all organizations, but we have a shared understanding that is necessary and that together we can make great things happen. The short-term burden of an increased workload and reckoning with uncomfortable change will bear fruit when we realize the efficiencies in our work, see the strengthening of our office as whole as well as individual professionals, and ultimately providing even better service to community than we are today. In the OCC, we see hinderances to progress as opportunities to overcome challenges and better ourselves in the process of doing so.

5. What is the status of your Department/Office in developing its strategic plan? If complete, please upload your plan with this report.

Our report is complete, and we will amend the file prior to the (as yet unscheduled) meeting of the Committee on Health, Equity, Human Needs, and Strategic Planning.

6. If not addressed in #5, what are your Department/Office goals for 2024?

#### **FISCAL EFFECT**

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

#### **VIRTUAL MEETING INVITES**

#### **PREPARED BY:**

Scott Brown, Acting Corporation Counsel; Karen Tidwall, Deputy Corporation Counsel  
Rhonda Rogers, Senior Office Coordinator;

#### **APPROVED BY:**

#### **ATTACHMENTS:**

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