

2024 Recommended Budget Overview

Prepared by the Office of the Comptroller
Scott B. Manske, CPA, Comptroller
Steve Cady, Research and Policy Director

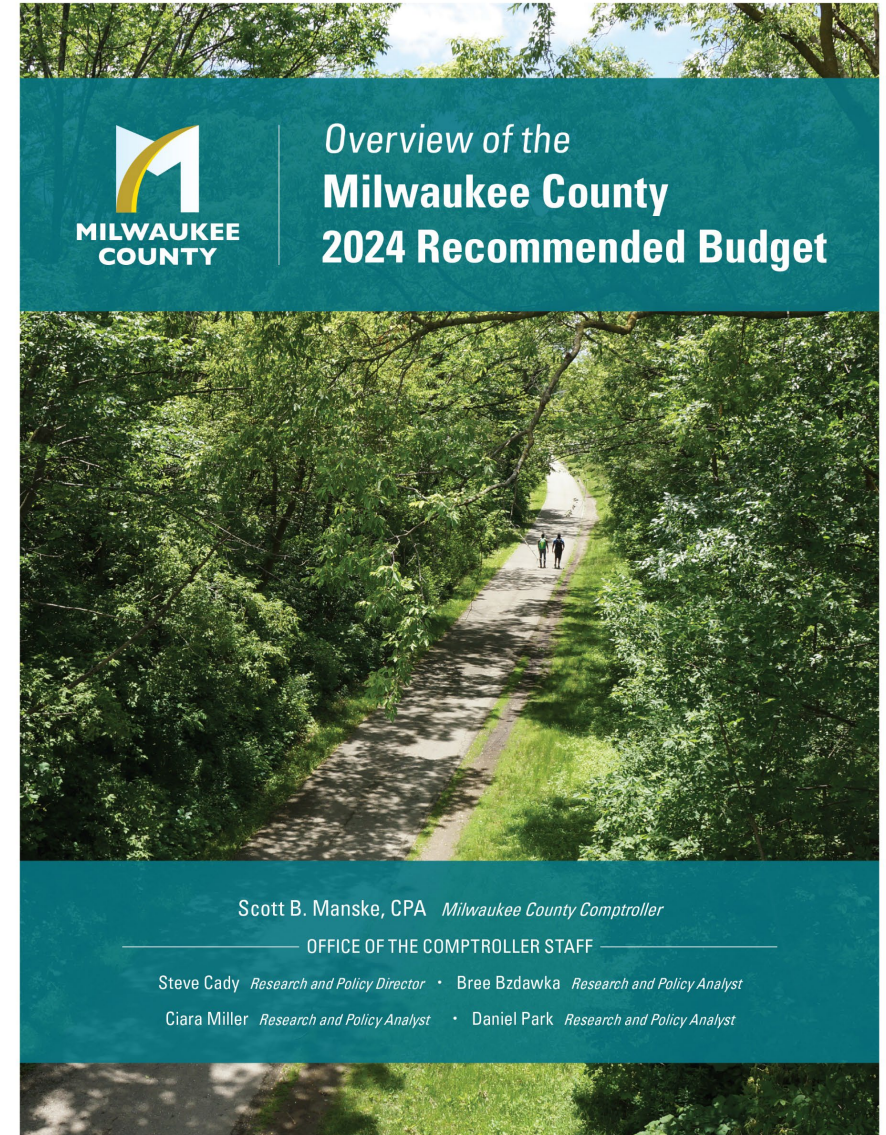
October 10, 2023



The Overview of the 2024 Recommended Budget

County Legislative Information Center (CLIC) under File No. 23-889

County.Milwaukee.Gov/CLIC



2024 Synopsis

- **Total Expenditures: \$1,363,239,671**
 - Decrease \$10.6M or 0.78%
- **Total Revenues: \$1,074,317,520**
 - Increase \$13.3M or 1.26%
- **Total Tax Levy: \$288,922,151**
 - Decrease of \$24M or 7.67%



State Tax Levy Cap

Allows for change in:

Net New Construction	\$2,862,831
0.4% Sales Tax for POB's	(\$23,447,035)
Change in Debt Service	\$994,384
Change in EMS Levy	\$416,165
SEWRPC Levy Change	<u>\$2,130</u>
Required Change in Levy:	(\$19,171,525)



CEX Recommended Tax Levy

2023 Adopted Tax Levy.....	\$312,922,151
2024 Recommended Tax Levy.....	\$288,922,151
Change from 2023 Adopted.....	(\$24,000,000)

Represents a decrease of
7.67%

Recommended tax levy is:

\$4,828,475 below State Tax Levy Limit



Budget Gaps, Five-Year Fiscal Forecast, & Inflation

Ongoing projected
expenditure increase
1.6% per Year

2024 Projected
Budget Gap
\$0

Ongoing projected
revenue increase
0.6% per Year

Inflation (CPI-U) for
12-month period
ending in August
3.4%



Act 12 Impact on Structural Deficit

Estimated Structural (Deficit)/Surplus		
Year	Pre Act 12	Post Act 12
	Five Year Forecast <i>before</i> 0.4% Sales Tax	Five Year Forecast <i>after</i> 0.4% Sales Tax
2024	(\$18,296,000)	\$31,642,000
2025	(\$52,775,000)	\$2,688,000
2026	(\$75,815,000)	(\$13,022,000)
2027	(\$93,311,000)	(\$23,317,000)
2028	(\$109,656,000)	(\$36,193,000)

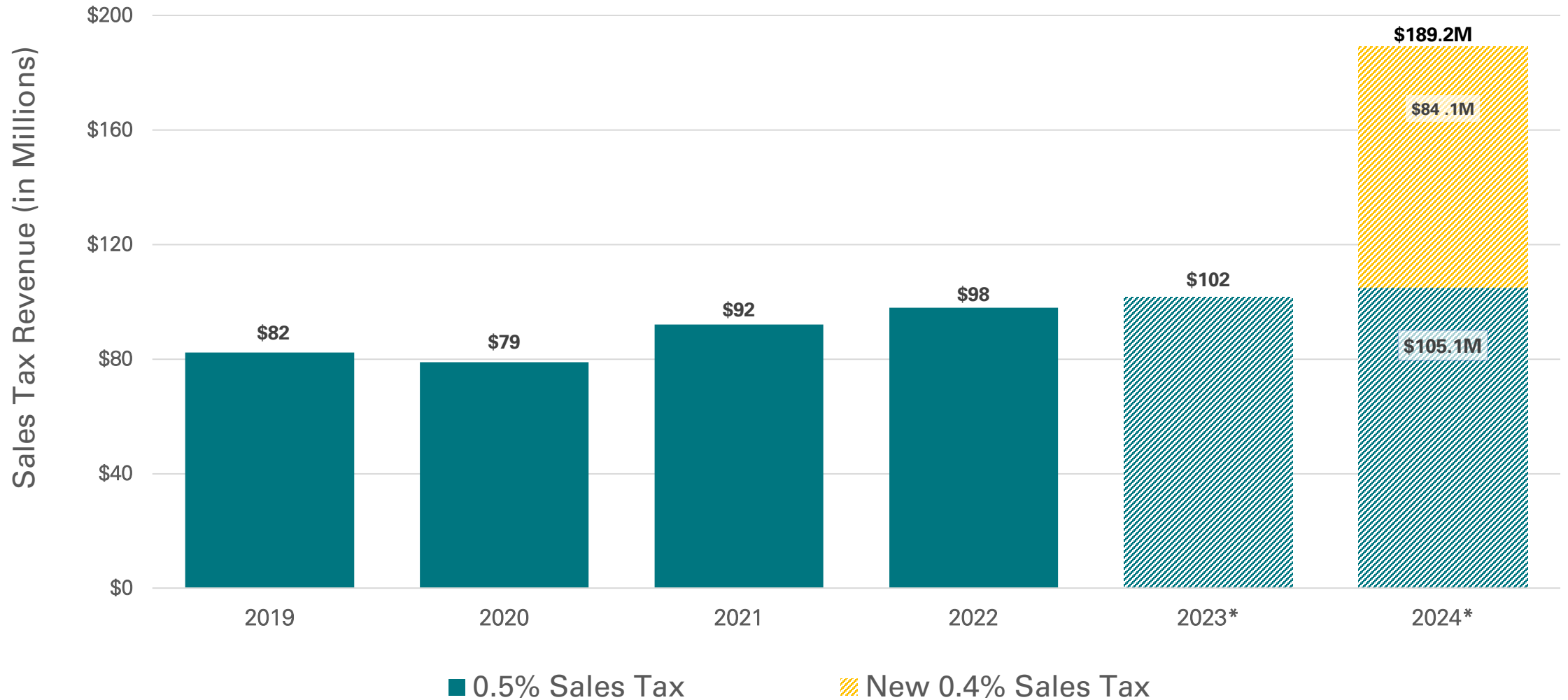


0.4% SALES TAX REVENUE USES (2024)

	0.4% Sales Tax Revenue using 30-Year Amortization of Unfunded Pension Liability	0.4% Sales Tax Revenue using 20-Year Amortization of Unfunded Pension Liability	Difference between 30-Year and 20-Year Amortization
0.4 % Sales Tax Revenue	\$84,085,035	\$84,085,035	\$0
Unfunded Pension Liability Payment	\$60,638,000	\$71,355,000	\$10,717,000
Funds Remaining to Pay Pension Obligation Bond Debt Service Costs	\$23,447,035	\$12,730,035	(\$10,717,000)
Total Pension Obligation Bond Debt Service	\$26,682,069	\$26,682,069	\$0
Remaining Pension Obligation Bond Debt Service Financed by Tax Levy	\$3,235,034	\$13,952,034	\$10,717,000

Milwaukee County Sales Tax Collections

2019 Actual to 2023 Projected & 2024 Recommended



Significant Additional Revenues

Compared to 2023 Adopted Budget

+\$84.1M

New Sales
Tax (0.4%)

+\$6.3M

Existing Sales
Tax (0.5%)

+\$8.1M

State Shared
Revenue

+\$4.0M

Debt Service
Contribution

+\$13.0M

Earnings on
Investments



Transit Deficit & “Fiscal Cliff”

Transit Fiscal Forecast and Budget Gap Analysis

	2024	2025	2026	2027	2028	2029
Total Gross Expenditures	\$170.4M	\$173.5M	\$176.7M	\$179.9M	\$183.3M	\$186.6M
Total Revenues	\$170.4M	\$170.3M	\$171.1M	\$164.2M	\$165.1M	\$165.9M
Estimated Budget Gap	\$ -	(\$3.2M)	(\$5.5M)	(\$15.7M)	(\$18.2M)	(\$20.7M)
Previous Five-Year Gap (March 2023 Projection)	(\$1.3M)	(\$25M)	(\$28.8M)	(\$32M)	(\$35.6M)	(Blank)

Transit Security Initiative

- **Additional \$1.3 million in transit security** funds will be used to supplement the current contract with Allied Universal Security to add:
 - Additional Hours and Vehicles
 - Dedicated dispatch security position
 - Security Field Supervisor positions
 - Training for all staff on engaging extended riders or those experiencing mental health issues
 - Increase visible security presence and response times

Fire Protection Agreement

- \$39 million owed to City of Wauwatosa between 2023 and 2041 under current agreement
- Renegotiated Plan reduces total owed to \$8.9 million by 2029 with ability to pay off sooner
- \$1.9 million in ARPA Funds approved in September
- Budget includes \$3.6 million; \$1.6 million for the annual payment and \$2 million in advance payments
- Payments would reduce outstanding balance to ~\$3.2 million, with the goal of paying the balance off by 2025



DHHS Investments

\$4.7M

- Affordable Housing Developments
- Emergency Housing Placements
- Case Management Support

\$1.2M

- Older Adult programming
- Senior Home Repair Fund

\$618K

- CYFS Radio Replacement
- Enhanced Youth Justice Continuum of Care

+31 FTEs

- 31 FTE new positions added to DHHS

CHILD SUPPORT SERVICES TO DDHS

- Integration of Child Support Services (CSS) into DHHS to ensure greater access as part of the **"No Wrong Door"** initiative



American Family Field Funding

- State Legislation may require County to contribute toward Stadium improvements
- No funds in 2024 Recommended Budget



Employee Compensation

2% general raise beginning in January

Pension Contribution for most employees **decreases from 6.1% of salary to 4.3%**

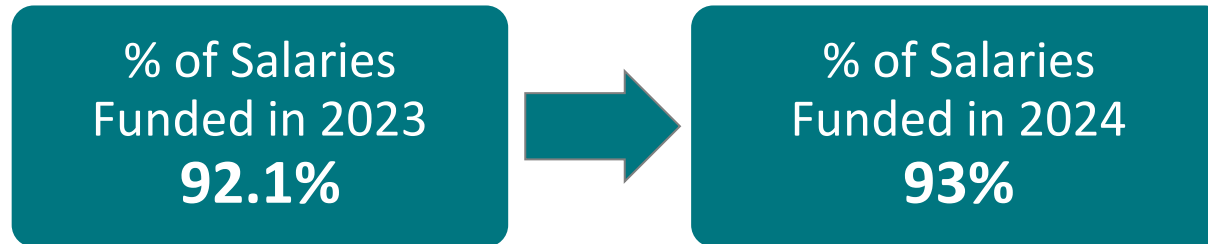
\$3 million reserved for employee **salary adjustments** after compensation study reviews next group of employees

Tax levy replaces **\$2M of ARPA** funding used in 2023 for **\$3/hour pay** increase for Correctional Officers



Employee Compensation

- \$1M Vacancy and Turnover budgeted centrally



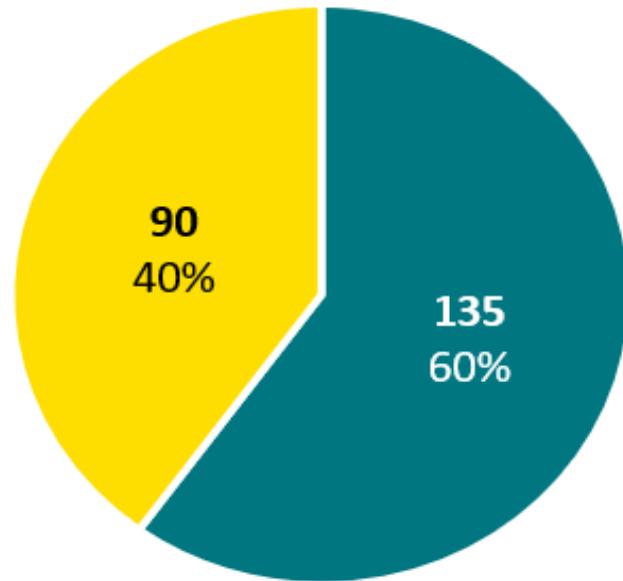
- **No changes** to Health/Dental insurance or Flexible Spending Account match
- **\$870K** provided to migrate away from OBRA retirement plan for seasonal positions to Social Security (+ \$989K to fully fund OBRA Plan)

Correctional Officer Pay

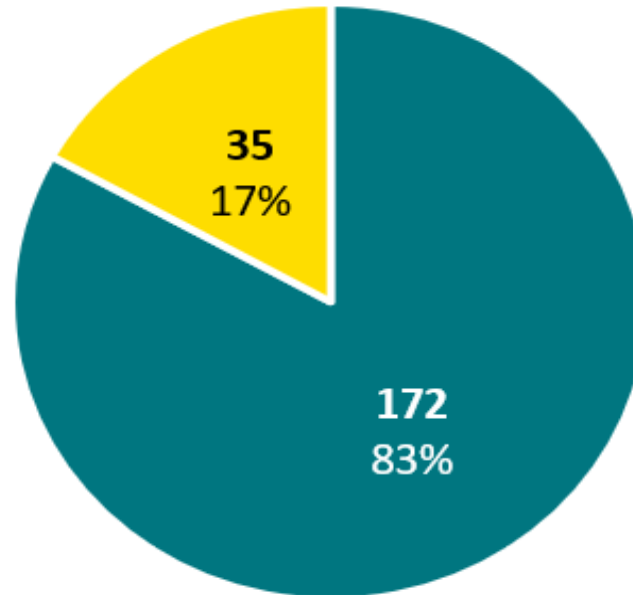
- Current Correctional Officer (CO) pay range is \$26.43 to \$29.68
- Recommended Budget allocates ~\$1.2 million for a 3% CO increase (compared to 2% pay increase for other general employees)
- \$400K is also provided for other CO longevity and retention incentives
- Other jurisdictions have or are planning to raise CO pay which may cause further recruitment and retention issues

Correctional Officer Vacancies

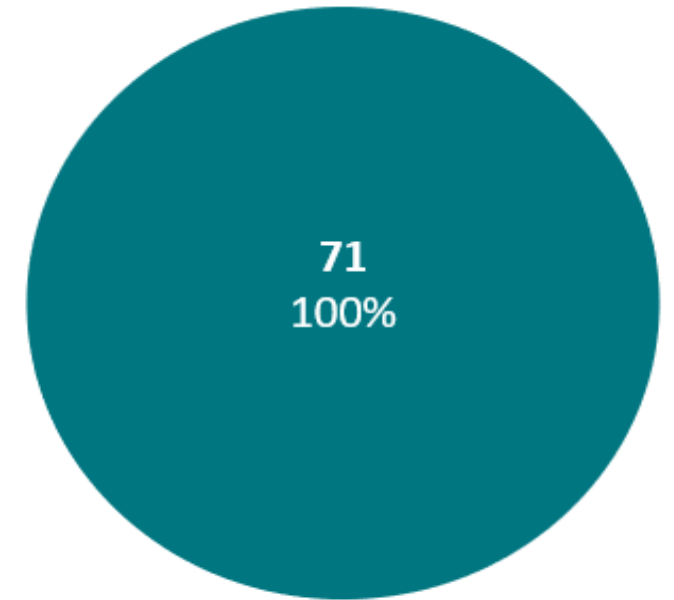
Milwaukee County
Sheriff's Office



Community
Reintegration Center



Dept. of Health and
Human Services



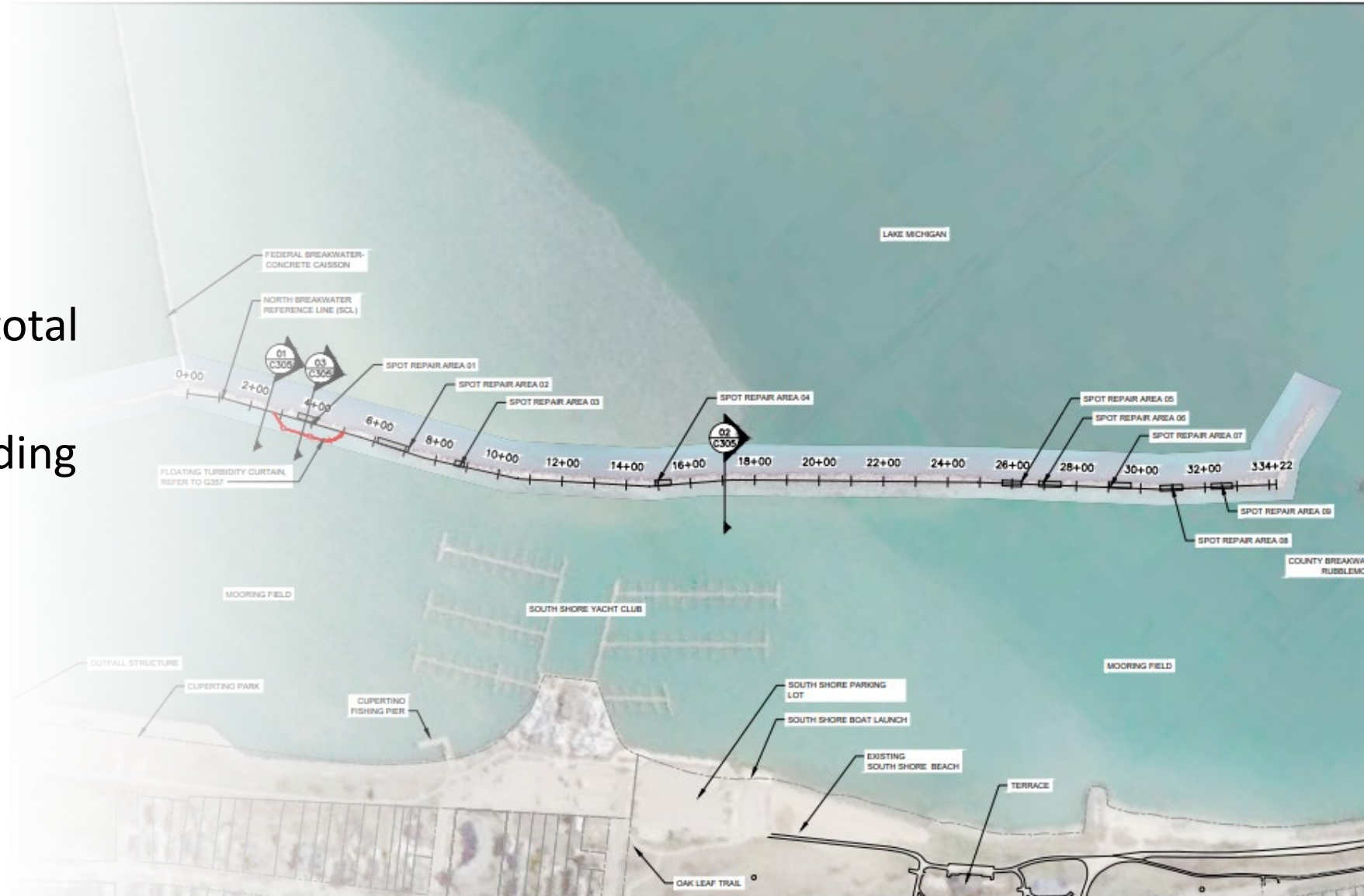
Vacant



Funded and Filled

Capital Budget

- **69 projects** funded for total expenditures of \$124M
- General Obligation Bonding of \$47.2M is at self-imposed bonding limit
- Tax Levy Cash Finances \$30.8M of non-airport projects, or 39.5%



Capital Improvements

\$23.2M for Parks & Cultural Improvements

- **\$11.3M** for the South Shore Breakwater
- **\$4.5M** for Parking Lot and Flushing Channel at McKinley Marina
- **\$4.3M** for Oak Leaf Trail Improvements

\$21M for new busses

- 30 new clean diesel busses offset **with \$16.8M of Federal Aid**

\$12.9M for fleet replacements

- Replacement of 155 fleet vehicles

Changes to Capital Improvements Committee (CIC) advisory recommendations can be found in Overview



An aerial photograph of a river winding through a lush, green forest. The sky is filled with large, white, fluffy clouds against a deep blue background. The text 'THANK YOU!' is superimposed in the center of the image in a large, white, bold, sans-serif font.

THANK YOU!

Office of the County Executive

2024 Recommended Budget

10/10/23



Department Purpose

- The County Executive's Office exists to serve Milwaukee County's nearly 1 million residents, 4,000 employees, and thousands more visitors by directing high-quality and responsive services while leading the County closer to its vision
- The County Executive's office provides leadership and management of County government to advance the vision



2023 Successes

- Secured long-term fiscal solution for Milwaukee County in the form of a local option sales tax
- Through passage of ACT 12, created dedicated revenue source for pension, freeing up property tax levy and ultimately will close the County pension system
- Invested \$20 million in affordable housing
- Broke ground on new Health and Human Services Building
- Solicited robust community input via Crowley Connect, Coffee with Crowley events, Budget Town Halls, and the Healthy County Challenge.



2023 Successes

- Submitted a balanced 2024 budget focusing on racial & health equity, and our core policy agenda areas of:
 - Affordable Housing, Transportation, Mental Health and Fiscal Sustainability
- Appointed 29 women and 21 people of color to the County's Boards and Commissions in 2023
- Ranked 3rd in the nation in assessment of local ARPA spending and awarded 5 NACo Achievement Awards.
- County Executive appointed to nationwide Commission on Mental Health and Wellbeing and as Chair of the NACo Large Urban Counties Caucus



Challenges

- Working to align departments and services across the County that have historically been siloed
- Attracting and retaining a diverse workforce at all levels of county government
- Exploring long-term solutions for transit system fiscal sustainability
- Working towards a long term sustainable solution for maintaining the Parks
- Continuing to work through our backlog of Capital projects with a focus on the Safety building



Strategic Focus Area Alignment

- **Create Intentional Inclusion:**
 - Budget includes 2% wage increase for general employees and \$3 million for Comp Study Funding
 - Appointed 79 women and 71 people of color to boards and commissions
 - Diversified leadership positions: half of cabinet level departments are led by women, and more than half of the cabinet leaders are Black.
- **Bridge the Gap:**
 - Allocated over \$11 million in opioid settlement funds to programs that focus on recovery, treatment, abatement, and prevention.
 - Integrating Child Support Services with DHHS as we continue to implement the no wrong door model
 - Removing phone charge commission revenue at CRC/MCJ to provide 390 free phone minutes and 60 free video phone minutes for residents to communicate with their loved ones
- **Invest in Equity:**
 - Made largest push for suburban affordable housing in over 20 years
 - \$16 million Tax Levy increase to transit system to maintain routes and service lines
 - \$200,000 investment in housing vouchers for residents leaving the CRC
 - Invested over \$80 million in rental assistance to over 22,600 unique households



Changes in 2024

- Personnel budget increase of \$46,737 to reflect both county-wide pay increases & increase in County Executive salary that was passed in September Board Cycle.
- Operational Budget increase of \$10,000 to ensure the Office of the County Executive is an effective advocate for Milwaukee County at the local, state, and federal levels



Thank You!



ONE COUNTY
ONE VISION

Questions?



ONE COUNTY
ONE VISION



**MILWAUKEE
COUNTY**

Office of Government Affairs

2024 Budget Overview

Prepared by Alec Knutson, Government Affairs Director



Department Purpose

- The Office represents a strong partnership between the Board and the Executive.
- The Office of Government Affairs' mission is to represent the interests of Milwaukee County and its residents before local, state and federal governments.
- Government Affairs staff are working to ensure the County has sufficient resources to achieve its vision.



2023 Successes

- **Historic Achievement.** As a result of unprecedented collaboration between the Milwaukee County Board and Milwaukee County Executive, which began with the Fair Deal Work Group in 2018, the Office of Government Affairs successfully advocated for the passage of historic legislation to reform the county's pension system, secure additional shared revenue, and authority to implement a local option sales tax.
- **Coalition Building.** Improved relationships with key stakeholders to influence policy and achieve outcomes that further Milwaukee County's vision. Coalition efforts were critical to securing additional federal and state funding.
- **Increased Revenues.** Office of Government Affairs successfully advocated for multiple federally funded projects, passed historic legislation to authorize a local option sales tax, and secured multiple funding increases through the state budget to secure over \$100M for 2024.



2023 Successes – Act 12

- Shared Revenue.

- First increase in shared revenue since 2010.
- Shared revenue is now a dynamic revenue source and is tied to the state sales tax and economic growth.

- Innovation Fund.

- \$300 million. Financial incentives for local government cooperation.

- Local Option Sales Tax.

- Authority to implement .4% local option sales tax.

- Pension Reform.

- Enabled Milwaukee County to utilize pension reform tool to place all future employees in the Wisconsin Retirement System.



2023 Successes – State Budget

- **County Veteran Service Officer (CVSO).** 25% annual increase of \$330,200
- **Victim Witness Appropriation.** \$1.5M increase in 2023-24 and \$1.9M in 2024-25. Allows for a 60% reimbursement to counties for services provided.
- **911 Fund.** Increases funding for public safety answering points grants (911 call centers) from \$6M to \$18M and GIS grant program from \$1.5M to \$6M.
- **Public Defender/District Attorney.** Increased wages and compensation structure.
- **Private Bar Reimbursement.** Increased from \$70/hr to \$100/hr.



2023 Successes – State Budget

- **General Transportation Aid.** 2% increase each year of the biennium.
- **Mass Transit Operating Assistance.** 2% increase of \$2.3 million.
- **Paratransit Aids.** \$400k increase.
- **Aging Disability Resource Centers.** \$7.5M increase.
- **Adult Protective Services.** \$2M increase.



2023 Successes – Congressionally Directed Spending

- **2023 Funding (\$14 million)**

- \$5 million Housing Rehab and First-time homebuyer funds
- \$3.85 million MCTS Bus Purchases
- \$2 million Medication Assisted Treatment mobile unit
- \$3 million Community Wellness Center

- **2024 Funding (\$12.5 million)**

- \$2 million Affordable Housing
- \$6.5 million MCTS Clean Diesel and Faster Bus Project
- \$4 million Lagoon Revitalization



2024 Challenges

- **Federal and State Legislative Session.** A more partisan state and federal legislature has created a difficult atmosphere to pursue even non-partisan solutions to challenges facing Milwaukee County.
 - The state legislative session is likely to conclude by February. As a result, time constraints and partisan pressures are expected to create challenges as Milwaukee County pursues a solutions-focused approach to advocacy.
- **Perception.** Continue to be intentional and focused relative to our legislative efforts. Ensure external stakeholders perceive Milwaukee County as a solutions-focused and valued thought partner while appreciating *why* achieving health, racial equity, and prosperity for everyone in our community makes Wisconsin stronger.



Changes in 2024

- Government Affairs requested a modest increase to support additional personnel costs with a fully staffed department and travel required for state and federal advocacy for both the staff members of OGA.



Closing

- Appreciate partnership with Milwaukee County Board to enable our department's successes.
- Department will continue advocating for Milwaukee County, growing partnerships to make us more effective, and secure resources that further our strategic vision to achieve racial equity in order to make Milwaukee County the healthiest county.



Questions?





**MILWAUKEE
COUNTY**

Org 1950 – Employee Fringe Benefits



2024 Recommended Budget

One County, One Vision: By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin

Health Benefits Costs



By Type	2023 Budget	2024 Budget	Change
Medical Insurance	\$65.5	\$58.9	(\$6.6)
Prescription Drugs	\$22.6	\$29.4	\$6.8
Dental	\$2.4	\$2.4	\$0.0
Other	\$9.0	\$8.2	(\$0.8)
TOTAL	\$99.5	\$98.8	(\$0.7)

All figures presented in millions

One County, One Vision: By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin

Health Benefits Highlights

- Employee premiums not increasing for sixth consecutive year.
- FSA maintained at \$1 to \$1 match up to \$1,000
- Retiree Health Subsidies are not included for most employees hired after 1/1/94.
- Retiree Health Care costs are “pay as you go”. The County does not set aside funds to pay for future costs like we do for pension.
 - Estimated long-term liability: \$1.2 billion.

*One County, One Vision: By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin*



Total Pension Costs



By Funding Source	2023 Budget	2024 Budget	Change
0.4% Sales Tax	\$0.0	\$84.1	\$84.1
Employee Contribution	\$13.3	\$9.9	(\$3.4)
Outside Revenue	\$14.4	\$2.7	(\$11.7)
Tax Levy	\$78.7	\$14.7	(\$64.0)
TOTAL	\$106.4	\$111.4	\$4.9

All figures presented in millions

*Note: \$84.1 million in pension costs and 0.4% sales tax are reflected in org 1951

*One County, One Vision: By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin*

Pension Highlights

- OBRA Contribution increases \$1M to bring plan to 100% funded
- Employee pension contribution decreases from 6.1% to 4.3% for general employees
- ERS closed to new employees as of 1/1/2025, no funds included in 2024 budget for WRS costs

One County, One Vision: By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin



Milwaukee County Register of Deeds Israel Ramón, Esq.

2024 Recommended Budget
October 10th, 2023



Department Purpose

The Register of Deeds Office was established in 1836. In 1849, the Wisconsin Constitution established the Office as a permanent element of the county-level governmental structure. There are 72 Registers of Deeds in Wisconsin that are responsible for carrying out mandates and directives under Wisconsin Statutes, namely Chapters 59 and 69.

Register of Deed Offices record, index, archive, secure and make available to the public all documents and instruments that affect real property in their county. In addition, Register of Deeds Offices issue vital records such as birth, death, marriage, divorce and domestic partnership registry records. Because of statewide issuance, our Office can issue any birth record whether one was born in our county or not and issue most death and marriage records whether the event happened in Milwaukee County or another county in Wisconsin.

What once was done with quill pens and parchment paper, Registers of Deeds now utilize advanced computer and cloud-based Technologies that allows for the storage and retrieval of millions of land records within seconds.



2023 Successes

- The Milwaukee County Register of Deeds Office processes, records and archives over 140,000 real property records a year. Several hundred instruments are recorded, indexed, and archived within one to two days after being presented to our office in person, through US mail or by eRecording services.
- The Milwaukee County Register of Deeds Office is the only county in the state to offer advanced technology and OnDemand services for vital records which are processed within minutes after receiving a request from our lobby kiosks and tablets as well as internet orders. Almost 50,000 vital records are issued yearly by our office.



2023 Successes – Continued

- We are currently in the process undergoing major remodeling of our Office which will relocate all real estate services to room 103 of the courthouse and all vital records and genealogy services to room G6. This remodel of our office will better align with our restructured organizational structure which I proposed in 2022.
- The Register of Deeds Office issued its first ever RFP and was able to competitively negotiate a five-year contract with our land records vendor which afforded approximately \$150,000 of savings over a five-year period.
- Our office saves county taxpayers over \$300,000 a year by having eliminated wasteful spending, cutting unnecessary and duplicative costs and negotiating new contracts.



Challenges

- The vitality Wisconsin's real estate market and specifically Milwaukee County's real estate market in 2023 has suffered greatly as a result of increasing interest rates on mortgages, refinance instruments and home equity loans which have affected thousands of homeowners. Commercial businesses have also been adversely affected because of high interest rates and decreasing real property investments.
- Decreasing real property purchases result in decreasing recording fees and the collection of transfer fees which negatively impact Milwaukee County and our residents.



Strategic Focus Area Alignment

- The ROD Office continues to prioritize customer service, accuracy in recording and advanced technology in all of our services.
- Being the only Latino Constitutional Officer in Wisconsin's history, I believe that Diversity, Equity and Inclusion are paramount to our county's success and that my office should reflect the rich diversity of our county residents. This includes being an office that is open and accepting so that our staff feels respected and secure.
- I am happy to report that the Register of Deeds Office exceeds overall County department measures for diversity having at least fifty percent of the staff classified as diverse or openly LGBTQ+.



2023 Budget Data Estimates

Personnel and Operating Costs

\$1,289,355

ROD Revenues

\$4,589,000 (-23%)

Tax Levy Contribution

\$3,299,645 (-7%)

One quarter remains for 2023.



Third Quarter 2023 highlights

Third Quarter 2023 Budget Highlights				
	<u>Actual</u>	<u>Budget</u>	<u>Variance</u>	
Total Revenue	\$3,536,874.08	\$4,589,000.00	\$1,052,125.92	
Recording Fees	\$922,655.00	\$1,400,000.00	\$477,345.00	
Transfer Fees	\$2,019,271.38	\$2,200,000.00	\$180,728.62	
Digital Images (Monarch)	\$96,773.70	\$210,000.00	\$113,226.30	
Indexed Data (Tapestry)	\$105,015.30	\$150,000.00	\$44,984.70	
ROD Internet Access (Laredo)	\$380,400.00	\$400,000.00	\$19,600.00	
Vital Records	\$177,860.00	\$190,000.00	\$12,140.00	



2024 Budget Data

Personnel and Operating Costs \$1,402,064

ROD Revenues \$4,048,300

Tax Levy Contribution \$2,646,236



Changes in 2024 – One-Time

- Due to the challenging real estate market, I anticipate decreased revenues of \$540,700 for the Register of Deeds Office.
- Decreasing revenues and increasing costs in 2024 will result in a reduction to our contribution to the tax levy in the amount of \$653,409 from 2023 levels.
- Despite the decreasing revenues, our services are statutorily mandated and must continue unabated and with a high level of customer service. Cross training ROD staff in processing, recording, indexing, auditing and research is progressing, but mandates more competitive wages that currently exist. I will be working with Human Resources and Compensation to address any existing inequities in light of vacancies that will need to be filled in 2024.



Closing

- For the first time in over twenty-five years, I am happy to represent Milwaukee County as a Board member and Second Vice President of the Wisconsin Register of Deeds Association. Milwaukee County leadership matters at the state level.
- I will continue to advise County Executive Crowley, our Board of Supervisors and our County's Assembly Representatives and State Senators on legislation that affects our Office such as transfer fees, racially restrictive covenants, the shielding of personally identifying information of our federal judges under Daniel's Law and state shielding proposals for election workers, and long-term real estate agreements that affect our state residents.
- My leadership team and I will continue to focus on delivering the best services for our County residents while decreasing unnecessary spending.



Questions?





**MILWAUKEE
COUNTY**

Office of Equity

2024 Recommended Budget
October 2023



Department Purpose

The Milwaukee County Office of Equity is catalytic to Milwaukee County's vision to be the healthiest county in Wisconsin by achieving racial equity. We value and empower residents to identify and create impactful change through awareness, responsibility, and action. We work to challenge and change policies, practices, and power structures that have resulted in historic and persistent barriers to equity



2023 Successes

- Developed resources for applying a racial equity lens to decision making
 - Compiled [Racial Equity Toolkit](#) on Webpage that reflects countywide efforts all in one place
 - Completed case study on authentic community engagement based Community Resilience Imperative's work in COVID-19 response
 - Updated Community Engagement Framework to both measure/demonstrate different levels involved
 - Leading cross departmental policy review- with over 35% of personnel policies, practices and procedures reviewed
 - Launched [Equity Compass](#) newsletter



2023 Successes – Continued

- Support Milwaukee County in building **intentional inclusion** and **bridging the gap**
 - Published [Healthier County videos](#) to further socialize the vision of Milwaukee County internally and publicly
 - Maintained commitment to African American community while expanding our reach to new communities. Invested in over 40 community-based events serving Latine', LGBTQIA, Native Americans, AAPI, underserved youth, and women
 - Lead participant for ICC's Racial Equity and Inclusion committee
 - Provided opportunities for DEI Council and NRGs to participate in community-based events. Significant leadership support provided by office (DEI Council participation, NRG cochair, NRG executive sponsorship)





Challenges

- Onboarding new staff team to County necessitated investment in internal systems and job training. First half of the year there was less external visibility of the office
- Politicalization of racial equity practices, literature and concepts
- Milwaukee County's internal capacity for cross departmental projects
- Evaluation on Milwaukee County's equity work thus far
- Developing community engagement multiyear project while spending down ARPA funding



Budget Data

- Requested department levy: \$955,196
 - Personnel: \$727,963 (5% decrease)
 - Operations: \$205,688 (38% decrease)
- Anticipated revenue/grants
 - ARPA: ~1.25mil remaining



Changes in 2024 – One-Time

- Significant decrease in professional services and community outreach being offset by ARPA funding



Changes in 2024 – Ongoing

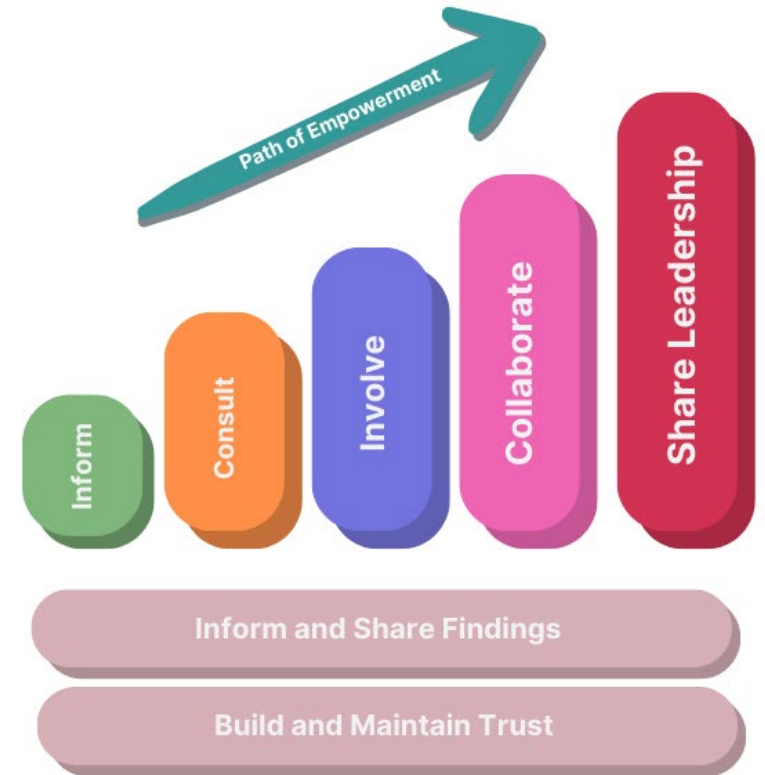
- No changes at this time



Closing

- We are grateful for the leadership of County Executive, County Board, and department leaders as we collectively work toward one county, one vision
- We are committed to increased impact in community empowerment to accelerate equitable outcomes
- We will continue to building capacity of county and resident-based leaders through providing tools, technical assistance, and building bridges for stronger collaboration

Community Engagement Continuum



Questions?





**MILWAUKEE
COUNTY**

Office of Corporation Counsel

2024 Recommended Budget
October 10, 2023

Margaret Daun, Corporation Counsel
Scott Brown, Deputy Corporation Counsel
Karen Tidwall, Deputy Corporation Counsel
Rhonda Rogers, Senior Office Coordinator



Department Purpose

The Office of Corporation Counsel (“OCC”) serves as chief legal counsel to all Milwaukee County departments and elected officials. The OCC is an inclusive and pragmatic partner to our clients and the community. By providing top notch, creative, compassionate, and responsive legal services, OCC strengthens and protects the County and our community.

We are **Client-Driven. Community-Focused.**

In executing the OCC’s statutory duties, we:

- Partner with clients to problem solve through a lens of equity and inclusion.
- Continuously strive to provide outstanding client service, to reduce legal risk, and develop best-in-class practices.
- Support client priorities to efficiently and equitably allocate resources, meet budget targets, and support operations.



2023 Successes

- Under Corporation Counsel Daun, the OCC has achieved remarkable success in recruitment and retention, improved quality and sophistication of legal services that are laser-focused on practical solutions, a public commitment to equity, diversity and inclusion, and an increased profile in the community, academia, the legal sector, and government.
- The OCC's staff continue to demonstrate remarkable professional achievement, countless victories in a broad variety of matters, and public awards.
- The OCC continues to provide value to the County through successful litigation and risk management.
- The OCC exceeded its revenue target in its previous year's budget by more than \$30,000.



2023 Successes (Continued)

- **Every dollar invested in the OCC provides a 3:1 return to Milwaukee County and its taxpayers** measured by cost savings relative to outside counsel, dollar efficiency in terms of workability of legal solutions, and overall risk reduction.
- Increased professional development opportunities for attorneys and support staff, through enrollment in professional associations and legal affinity groups at negotiated discounted rates. OCC has also hosted internal training events to enhance our staff's skill and expertise.
- Internal racial equity programming including an all-office visit to the Black Holocaust Museum.
- Assistant Corporation Counsel, Kathryn West, supported Human Resources in implementing a substance abuse mitigation program.



2023 Successes Continued

- Enhanced deployment of our mental health's teams resources within the community, by implementing intake software for Three Party Petitions, reorganization/reallocation of office resources for mental health matters, and the addition of newly hired attorney, Assistant Corporation Counsel, Emily Cerbins, to the team.
- Corporation Counsel Margaret Daun, Deputies Corporation Counsel Scott Brown and Karen Tidwall, Assistants Corporation Counsel, Lisa Procaccio and William Davidson have had speaking engagements relating to their expertise at OCC.
- OCC staff continue to hold leadership positions in variety of civil organizations including the State Bar of Wisconsin, the Milwaukee Bar Association, and the Eastern District of Wisconsin Bar Association.
- In the 2024 budget, the OCC hopes to secure funding for a technological transformation that will enable enhanced risk tracking and management, generating hard data that will facilitate providing superior advice to clients with very specifically-identified risk vectors.



Challenges

Too many cases still must go to outside counsel, at great cost to the County and taxpayers. Outside counsel cannot deliver legal services that equal the OCC's.

- Efficiency and effectiveness;
 - Equity commitment; and
 - Unconflicted loyalty to the County and this community.
- More attorneys = greater, more efficient service in quality and quantity and usability = massive cost savings.
 - More competitive compensation = even better recruitment and retention of diverse and inclusive staff = more equity and more cost savings.



Challenges (Continued)

With expanded resources, the OCC would deliver:

- state of the art case management;
- point in time and trend analysis of risks/costs from litigation that help identify departments in need of additional training;
- additional client guidance/training;
- online subject matter guides organized by subject matter;
- publicly accessible and searchable OCC opinion database; and
- community-facing in-person and online learning, listening, and info sharing sessions.



Strategic Focus Area Alignment

Create Intentional Inclusion

- The OCC seeks to recruit applicants from diverse backgrounds by partnering with various affinity groups to foster interest from a larger cross-section of applicants. Similarly, the OCC has worked with local law school to recruit interns from diverse backgrounds.
- Every staff member is encouraged and supported in their work with community organization that foster inclusion across the County.
- The OCC demands that the outside firms that provide legal services to the County commit to recruitment of diverse talent and that they provide statistics that corroborate those efforts. Additionally, OCC looks to work with small and medium-sized firms with diverse leadership and staffing.



Strategic Focus Area Alignment

Bridge the Gap

- Evaluate all legal matters through a lens of equity and inclusion.
- Rigorously analyze the relationship between our work and health disparities within the County and prioritize and calibrate our efforts accordingly. (Ex: assisting with BHS evolution, multiyear equity review).
- Challenge and partner with clients to consider equity impacts of decisions and programs.
- Have regular check-ins with our clients to ensure a thorough understanding of our clients' needs and to enhance the quality of services provided.



Strategic Focus Area Alignment

Invest in Equity

As a department that serves all County departments and elected officials, we

- assist clients in combatting inequities – both systemic and ad hoc – through a legal lens, informed by an across-the-county perspective (Ex: multiyear equity review);
- enhance the County's fiscal health and sustainability by continuing to mitigate legal risks, increase operational efficiency, and by helping leaders make the best decisions;
- initiate pro-active litigation to bring funds into the County to ameliorate hazards to the community (Ex: opioid and PFAS);
- support, advise, and collaborate with clients and stakeholders on measures to break down barriers to diverse communities (Ex: open records request portal); and
- act as statewide legal thought leader regarding election processes, best practices, and equity.



Budget Data

Category	2021 Actuals	2022 Actuals	2023 Budget	2024 Department Request	2023/2024 Variance
Expenses					
Personnel Costs	\$2,135,633	\$2,240,344	\$2,409,321	\$2,520,273	\$110,952
Operations Costs	\$119,579	\$124,057	\$107,534	\$107,534	\$0
Debt & Depreciation	\$0	\$0	\$0	\$0	\$0
Interdepartmental Charges	(\$864,966)	(\$942,221)	(\$905,640)	(\$975,000)	(\$69,360)
Total Expense	\$1,390,245	\$1,422,180	\$1,611,215	\$1,652,807	\$41,592
Revenues					
Other Direct Revenue	\$64,623	\$240,461	\$292,556	\$297,870	\$5,314
Indirect Revenue	(\$226)	\$0	\$0	\$0	\$0
Total Revenue	\$64,397	\$240,461	\$292,556	\$297,870	\$5,314
Tax Levy	\$1,325,849	\$1,181,719	\$1,318,659	\$1,354,937	\$36,278
Personnel					
Full-Time Pos. (FTE)	25.00	25.00	25.00	26.00	1.00
Overtime \$	\$21,982	\$2,670	\$0	\$0	\$0
Seasonal/Hourly/Pool \$					



Changes in 2024

In 2024, OCC will begin implementation of an upgrade to its legal practice intake and workflow processes. An online tool will allow the OCC to capture and track all matters handled, including:

- The specific nature/practice area for each matter;
- The departments and individuals requesting services;
- Dispositions/outcomes;
- The time spent on each matter by each attorney;
- The time spent on individual departments; and
- The generation of more detailed reports.



Closing

We are in the unique position to be not just a leader of racial equity, but a driver of positive change within the County and our community. We lead with our commitment to racial equity and diversity.

As compared to similar public law departments,

- High production
- Small staffed / small budget
- Diverse
- Pragmatic and unconflicted

Outside counsel

- Promoting diversity and inclusion
- Careful attention to how outside counsel litigates / settles
- Wisconsin General Counsel Forum analysis continues



Questions?



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