



## OFFICE OF CORPORATION COUNSEL

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*Client-Driven. Community-Focused.*

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To: Isaac Rowlett, Director of Strategy,  
Office of the County Executive

From: Margaret C. Daun, Corporation Counsel  
Scott F. Brown, Deputy Corporation Counsel  
Karen D. Tidwall, Deputy Corporation Counsel

Date: July 8, 2022

Re: File No. 22-104's Request for Annual Report from Office of Corporation Counsel

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County Board File No. 22-104 amended 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.” It requires the Office of Corporation Counsel (OCC) to explain its performance relative to its goals for 2021, the rationale for those goals, and its longer-term strategic plans. This memorandum is provided in response to that directive and is grouped into three sections: (I) Introduction, (II) 2021 Goals, Successes, and Setbacks; and (III) Long Term Success Needs.

### **I. Introduction**

The OCC's Mission is stated on its letterhead footer: “The [OCC] strengthens the County community and empowers residents through highly competent, creative, compassionate and responsive legal services provided in strategic partnership with County stakeholders to optimize decision making, reduce risks, and maximize public resources.”

Our Vision summarizes and expands our mission: “The [OCC] is a valued, inclusive client and community partner. We...

- “Partner in client decision making with an eye toward equity and inclusion.
- “Continuously strive to provide outstanding client service, to reduce legal risk, and develop best-in-class practices.
- “Enhance operational efficiency by providing clients options to effectively meet county business needs and deadlines.
- “Support client priorities to efficiently and equitably allocate resources, meet budget

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targets, and support operations.

- “Support our team to enhance our capabilities and recognize the excellence and integrity of our people.”

Our Values, also encapsulated in our 2022 strategic plan, ground our mission and vision:

- “Client-Driven. The OCC provides timely, accurate and useful work product, rooted in a client-centered approach.
- “Community-Focused. The OCC integrates equity and inclusion in our day-to-day work to achieve the County’s mission to become the healthiest county in Wisconsin in our day-to-day work.
- “Highest-Integrity. The OCC reflects the highest standards of legal ethics and supports client integrity and excellence.”

Our Diversity Statement, found again in our 2022 strategic plan, informs our day-to-day work:

- “We work to create a workplace that reflects the community we are part of and that we serve.
- “We empower the diversification of the legal profession.
- “We celebrate the diverse voices of our employees and clients.
- “Equity fuels our mission, vision, and values.”

Taking the above together then, 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.

## **II. 2021 Goals, Successes and Setbacks**

Under Corporation Counsel Daun, the OCC has identified an audacious goal: to be recognized as one of the best municipal law departments in the country and by extension, to become a destination legal employer of choice in the region and beyond. This overarching objective drives each year’s objectives and long-range strategic planning.

A. 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. maximally efficient time allocation based upon a case/project's impact on mission, community trust, operations, precedent with courts or stakeholders, and finances;
4. cross-charging to other departments based on actual use and actual market rates;
5. better collaboration with County insurers, Risk Management, and outside counsel; and
6. OCC team members to better manage hybrid work environment, professional development, and client relationships and education.

Achieved? Significant progress made in partnership with IMSD to identify and begin testing software system.

Progress? Work continues in partnership with IMSD.

B. Systemize workflow intake processes/forms to ensure that all inquiries are handled in a timely and responsive fashion.

Achieved? No.

Progress? Work has begun in earnest, looking to dovetail this with goal #1 above.

C. Publish diversity statistics regarding outside counsel law firm demographics to continue to demand accountability and immediate action and host diversity engagement sessions among OCC staff to address the lack of diversity in the law and to achieve greater equity in County outside legal counsel spending.

Achieved? Significant progress made in partnership with the Wisconsin General Counsel Forum to support a southeastern Wisconsin analysis. As to specific County outside legal counsel, progress was stymied by a lack of firm response, potentially complicated by COVID-19. Successfully convened initial diversity engagement programming for OCC staff.

Progress? General Counsel Forum data collection and analysis proceeding. Efforts underway again under the direct leadership of Corporation Counsel Daun. Successful implementation of year-round diversity engagement programming. All OCC staff encouraged to participate in County and external DEI training.

D. Establish objective professional development metrics and feedback processes specific

to the OCC's unique services (e.g., litigation, advisory, and transactional). This includes differentiating between performance expectations in new areas of practice versus areas of established expertise, as well as EQ, equity commitment and intentionality in daily work, and intraoffice cultural ownership-accountability-responsibility. Objective feedback and development processes are necessary to ensure employee engagement, satisfaction, productivity, and morale, which in turn supports the OCC's overall equity commitment and mission.

Achieved? Drafts have been developed and are being reworked for presentation and feedback to the entire office. Short of specialized career-path professional development metrics, we increased professional development and outreach opportunities for attorneys and support staff, through creative funding and efficient group program enrollments, as well as legal affinity organizations, including ERGs. In addition, all staff meet 1:1 with their direct managers to establish a constant source of feedback, management, and coaching. This year, the OCC has attempted to "test run" a planned annual calendar of internal trainings and diversity programming for OCC staff.

Progress? Substantial progress has been made, including implementation of 1:1 meetings. Anticipate introductory roll-out to staff before 1Q2023. Formalized annual training, social, and diversity programming ahead of 1Q2023 for staff.

- E. Continue client education (through trainings, guides, opinions, etc.) and encourage community involvement by the office and staff to build trust-based relationships within the County and beyond, to foster accessibility, continue to develop the OCC's reputation, and to build partnerships to achieve the County's mission.

Achieved? Yes. We are laser focused on promoting and celebrating OCC community successes and involvement, as well as our clients' successes.

Future objectives include: Continue to expand and update current client guidance/training, including online guides organized by subject matter, a publicly accessible and searchable OCC opinion database, in-person learning sessions and finally, to introduce public listening and info sharing sessions by the OCC. Formalized annual calendar of trainings and community outreach published and publicized well in advance.

### **III. Long Term Success Needs**

- A. Like every department in Milwaukee County, we face acute challenges with retention and compensation. To expand the OCC's capacity and to achieve our long-term objective to become a best-in-class government general counsel office, continued investment in OCC personnel to increase the number of OCC and to retain current staff

through competitive compensation commensurate with the complexity and quality of work is essential. Every dollar invested in the OCC provides a nearly 3:1 return to Milwaukee County and its taxpayers. The OCC hopes to soon quantify the ROI to the County (see III. B below), but a common-sense comparison between the hourly rates of OCC lawyers and paraprofessionals to their private sector counterparts more than makes the point.

That said, under Corporation Counsel Daun, the OCC has achieved remarkable recruiting success through an increased office profile, continued public commitment to equity, community and client involvement of all OCC members, significant revision of JEQs and job descriptions, and intentional recruiting that emphasizes the impact, breadth, and public service elements of our work.

One essential personnel objective for 2021 was to hire two top-tier individuals to replace fill Deputy Corporation Counsel roles. That objective was achieved with smashing success with the hiring of Scott Brown and Karen Tidwall. These deputies, in partnership with entire OCC team, will lead the OCC's continued evolution and development.

- B. In addition to continued investment in personnel, we need significant investment in OCC software to empower the OCC to meet goals #1 and 2 above, as well as additional investment in e-discovery software.

In closing, as stated above, the OCC's ultimate objective is to be recognized as one of the best municipal law departments in the country and by extension, to become a destination legal employer of choice in the region and beyond. A cutting edge, best-in-class, public sector general counsel office is what Milwaukee County – a municipal corporation with an annual budget of over \$1 billion and over 4,000 employees – and its residents deserve. This requires increased investment in staffing and software.

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