



Office of the Comptroller

Milwaukee County

Scott B. Manske • Comptroller

COUNTY OF MILWAUKEE

Inter-Office Communication

Date: April 19, 2024

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

From: Liz Sumner, Milwaukee County Comptroller

Subject: Office of the Comptroller 2023 Annual Report

File Type: Informational Report

This informational report provides a report on how Office of the Comptroller set and achieved its 2023 goals.

POLICY

This report aligns to Chapter 108: Achieving Racial Equity & Health.

Milwaukee County Code of General Ordinances:	Chapter 108: Achieving Racial Equity & Health
--	---

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 goals is articulated in response to the questions below.

BODY

1. What were the top 3 goals of your department/office 2024? 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: Knowledge transfer to support leadership transition.
 - The Office of the Comptroller has engaged in many activities to ensure information and processes have been documented and discussed to prepare for a smooth transition to a new Milwaukee County Comptroller. Documents have been annotated, staff (both within the Office and in other departments) have engaged in numerous additional recorded meetings/training sessions with the retiring Comptroller to get necessary background information to complete mission-critical financial processes.
 - Goal 2: Continue high levels of public accountability, transparency and decision-support through issuance of 5-year fiscal forecast and annual budget analysis.
 - Annually the Comptroller’s Research Services Staff provides an overview of the County Executive’s 2024 Recommended Budget. This overview consists of the

following four sections: 1. Section 1 is a General Overview of the Recommended Budget 2. Section 2 shows Tax Levy Changes for each Organizational Unit, comparing the 2024 Recommended Budget with the 2023 Adopted Budget. 3. Section 3 provides a summary of Major Changes, proposed by the County Executive in the 2024 Recommended Budget. 4. Section 4 is the Capital Improvements section, which summarizes the capital improvement projects proposed by the County Executive. This overview serves as an initial analysis to highlight major policy and budget changes proposed by the County Executive and is intended to assist interested parties in their understanding of the budget.

- The five-year forecast for Milwaukee County is a tool for helping policymakers and the public understand the future challenges and opportunities of the County budget. Mandated by § 59.255(2)(h) Wis. Stats., the Comptroller produces this annual report based on reasonable assumptions about general economic conditions and projected changes in County revenues and expenditures. The goal of this forecast is to determine the extent of actions necessary to close the gap between revenues and expenditures, ensuring long term fiscal sustainability. The forecast assists policymakers in the County's financial decision-making process to demonstrate the long-range impact of courses of actions being considered by the County and to gauge the effect of past decisions.

- Goal 3: Support activities in support of Act 12 (sales tax)
- Expert staff from the Office of the Comptroller provided analysis, data, and advisement to support the successful County-wide effort to influence state policymakers to allow Milwaukee County to increase the sales tax to provide much needed economic relief for county finances.

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

- a. Goal 1: Information that is helpful to the new Comptroller has been stored electronically. Staff has been provided with necessary background on issues and processes.

- b. Goal 2: Both reports were delivered on schedule and presented to the Finance Committee of the County Board in a timely manner. The reports are available to the public as well. [Milwaukee County Comptroller & Audit Reports](#)

- c. Goal 3: Yes, Act 12 was successfully passed and planning for the utilization of the funding in compliance with Act was implemented for the 2024 budget.

3. What factors *enabled* progress toward accomplishing these goals?
Staff expertise, cooperation and information sharing were essential components in achieving the goals.

4. What factors *hindered* progress toward accomplishing these goals? All three goals were undertaken on demanding time frames.

5. What is the status of your Department/Office in developing its strategic plan? If complete, please upload your plan with this report.
In 2024 Milwaukee County has a new Comptroller and so a new strategic plan will be developed.

6. If not addressed in #5, what are your Department/Office goals for 2024? In 2024 Milwaukee County has a new Comptroller and so a new strategic plan will be developed.

FISCAL EFFECT

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

VIRTUAL MEETING INVITES

PREPARED BY:

Michelle Nate, Office of the Comptroller, Deputy Comptroller

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