

Project Charter
Milwaukee Climate & Equity Plan

Prepared for the
City-County Task Force on Climate & Economic Equity
(CCTFCEE)



Adapted from a template by the University of California-Berkeley:

https://vca.berkeley.edu/sites/default/files/project_charter_template_v11.18.15.pdf

| I. PROJECT INFORMATION | | | |
|---|---|-------------|-----------------|
| Co-Sponsors | City of Milwaukee Milwaukee County | | |
| CCTCCEE Co-Chairs | Alderman Nik Kovac Supervisor Supreme Moore Omokunde | | |
| CCTFCEE Members (Steering Committee) | (Approved by Common Council) Pam Fendt, Julie Kerksick, Ted Kraig, George Martin, Janet Meissner Pritchard, Pamela Ritger, Erick Shambarger, and Rafael Smith, August Ball, and Linda Frank, subject to revision by Council appointment | | |
| Project Manager | Erick Shambarger City of Milwaukee, Environmental Collaboration Office eshamb@milwaukee.gov 414-708-9187 | | |
| Working Groups | Working groups comprised of CCTFCEE members, representatives from relevant government agencies, business, and academia, and other community stakeholders. Workgroup sign-up form is here . Working groups are open to public stakeholders who are committed to advancing climate and equity action in the public interest. | | |
| Project Public Facing Website | milwaukee.gov/ClimatePlan | | |
| File Sharing | Project Manager or Working group chairs will distribute documents through Legistar and by email. Members can send suggested revisions to the document author directly without copying others, or suggest edits at publicly-noticed meetings. All meetings of workgroups must be properly publicly notices. | | |
| Project Charter Version | Version # | Date | Comments |
| | 2.0 | 12/14/2020 | Second draft |

| II. PURPOSE & GOALS |
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| <p>Milwaukee as part of planet Earth faces grave threats from climate change, which is caused by the release of greenhouse gas emissions from excessive use of fossil fuels and land use changes that reduce biodiversity and carbon sequestration. In addition, Milwaukee has pronounced racial disparities that could be exacerbated by climate change. Low-income communities face environmental hazards at a higher rate. In the face of these threats and challenges, Milwaukee has the opportunity to chart a course that supports a new clean energy economy while creating new opportunities for people of color to more fully and equitably participate in the economic life of Milwaukee.</p> <p>As directed by the City of Milwaukee Common Council and Milwaukee County Board of Supervisors, the Climate and Equity Plan will “address the ongoing climate crisis, ensuring Milwaukee meets the obligations set by scientists for necessary greenhouse gas reduction, and mitigating racial and economic inequity through ‘green’ jobs” (Common Council File 190445 and County Board File 19582).</p> <p>The Climate and Equity Plan will provide a roadmap for achieving two goals:</p> |

- Reduce Milwaukee’s community-wide net greenhouse gas emissions by at least 45% by the year 2030 and achieve net zero greenhouse gas emissions by 2050 or sooner.
- Reduce racial and income inequality in Milwaukee by assuring that greenhouse gas reduction investments and policies create the maximum number of permanent living wage green jobs for people who live in the most impoverished neighborhoods with limited economic opportunity.

Research suggests that green jobs are higher paying than comparable occupations, have lower barriers to entry than other similar professions, and are more accessible to people without high educational attainment¹. Thus, by integrating equity goals with climate planning, Milwaukee will be better positioned to maximize the economic and social benefits of these investments.

III. SCOPE

Plan recommendations will focus on strategies that **directly reduce** the causes or impacts of climate change and advance racial and income equity in Milwaukee, including:

Executive Summary

- Importance of Climate and Equity Action in Milwaukee
- Concise summary of Greenhouse Gas Inventory
- Wedge diagram to demonstrate how proposed strategies yield 45% carbon reduction goal
- Selection of major equity indicator to improve, such as number of family-supporting jobs for people of color
- Summary of major strategy proposals
- Implementation and on-going reporting

Chapters

Climate Change Mitigation Recommendations and Strategies:

- (1) Large Scale Transition to Renewable Energy on the Grid
- (2) Commercial Buildings
- (3) Residential New Housing Strategy
- (4) Residential Retrofit Strategy
- (5) Sustainable Industry
- (6) Transportation and Mobility

Climate Change Adaptation Strategies:

- (7) Land Use, Urban Agriculture, and Reforestation/Greening of Milwaukee
- (8) Adaptation and Climate Resilience
- (9) Waste and Sustainable Consumption

¹ Brookings Institution, 2019.

(10) Green Jobs: [Each Chapter will include a review of related jobs and equity related to that strategy. This Chapter will be included if the workgroup identifies a single major new jobs initiative and work done to map out green job pathways]

(11) Financing: [Each Chapter will include a financing discussion. A separate Financing Chapter will be included only if the Committee agrees to promote a major new revenue source to fund climate work.]

Each chapter will provide background information on the topic and be structured to focus on **one big, fully developed strategy solution**. The strategy must contain the following elements:

- Lead organization that will have agreed to implement the strategy, plus additional stakeholders that can support the policy
- Estimated greenhouse gas savings by 2030. Strategies should also set the stage for additional reductions beyond 2030 with an eye toward net zero energy by 2050.
- Discussion of how the strategy will reduce racial disparities or create economic opportunities, especially for people of color; Workgroups will complete the “Equity Impact Statement” for recommended strategies as required by Council resolution [190928](#).
- An identified local funding source that can be used to start and sustain the project. This could include City or County funds, utility funded projects, or other realistic private sector investments.
- An explanation of how the strategy could be scaled up with new State or Federal government funding
- Answer possible objections to the proposal
- An infographic to visually explain the benefits
- An example of another city that has implemented a similar idea, if applicable
- Job training and opportunities necessary to implement the strategy
- An implementation timeline

Each Chapter will also include:

- Sidebar on how City and County are leading or will lead in their respective operations
- Secondary strategies to achieve the goal
- How to effectively educate the public about the strategy

IV. OUT OF SCOPE

The geographic focus of the plan will be the city of Milwaukee community, including but not limited to City and County government operations therein. However, the Task Force will strive to make plan recommendations replicable by other municipalities in Milwaukee County. The plan will also not address environmental issues or social equity issues that are unrelated to climate change or which cannot be addressed as part of climate change-related solutions.

| V. PROJECT ROLES & RESPONSIBILITIES | | |
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| Individual or Group Name | Role | Responsibilities |
| City of Milwaukee Common Council & Milwaukee County Board of Supervisors | Project Sponsor(s) | Provide overall direction, guidance, and funding/resources for project; set vision and strategic direction; keep abreast of major project activities. |
| Alderman Nik Kovac & Supervisor Supreme Moore Omokunde | Co-Chairs | Set CCTFCEE meeting agendas; oversee project; act as a liaison to other elected officials |
| City County Task Force on Climate and Economic Equity | Steering Committee | Approve project charter; inform project manager and team members of issues, scope changes, risks, and quality concerns; members lead Work Group meetings and serve as a liaison between the Task Force and general public. |
| Erick Shambarger | Project Manager | Lead team in planning and implementing project from start to finish; administer consulting contracts; oversee scope and change management, keeping project charter current; manage project-related risks; maintain project documents; report project status |
| Luke Knapp | Analysis | Perform legislative research needs |
| Linda Elmer | Staff Assistant | Post public meetings, take meeting minutes, and ensure documents are properly shared publicly |
| ICLEI-USA GHG | Consultant | Estimate GHG reductions from proposed strategies |
| Work Groups | Advisory Groups | Gain understanding of work to be completed, completing research, data gathering, analysis, and documentation; members advise Task Force about relevant elements of the climate and equity plan.; Workgroups should develop mini-project management plans to ensure they are able to deliver fully implementable strategy proposals. Workgroups are encouraged to reach out to stakeholder groups for periodic input and feedback. |
| Paid Workgroup Consultants | Subject Matter Experts | Provide quantitative or other technical expertise on project elements including new technical solutions; validate recommendations; provide analysis of strategy impacts on markets Project Manager will administer consultant contracts with input from working groups. Working groups will help develop scopes of work for consultants and help select consultants with equity as a criterion. |
| TBD | Consultant | Provide graphic design, layout and finishing of Climate and Equity Plan |
| General Public | Provide validation and high-level | All working group meetings are open to the public for viewing. Additionally the general public can provide input through various platforms, including a proposed video |

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| | feedback | interview platform, surveys, and public comment at possible town hall style meetings. |
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| VI. Working Group Responsibilities | | | Resources |
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| Working Group | Plan Chapter | Description of Work | <i>(Bolded funds are reflected in project budget; in-kind support is not bold)</i> |
| Jobs & Equity | Green Jobs + jobs discussion in each chapter | Develop Green Jobs Map that identifies career pathways with existing training institutions; identify means of building interest, training, and hiring of jobs for people of color; Work should be aligned with Milwaukee's involvement in US DOE's Workforce Accelerator | \$10,000 consulting; \$5,000 for Green Jobs map, +\$5,000 for equity mapping and analysis US DOE provided technical support- University of Nebraska-Lincoln |
| Education and Outreach | Communication section in each of the major chapters | Oversee public engagement during the planning process; grow public support for large scale climate action, and effectively convey workgroup activities to the public | \$22,800 (pending grant), including Climate Vulnerability document, online video interview platform, paid marketing; in-kind ECO staff time pending grant |
| Green Buildings | New Residential Buildings Residential Retrofit Commercial Buildings | Explore chapters for energy efficiency: Residential Buildings- New construction featuring passive heating or other strategies for near net zero and advanced building construction methods to reduce costs; Residential building retrofits; commercial stretch buildings codes, benchmarking ordinance, or other regulatory approaches to promote beneficial electrification; | \$10,000 , including up to \$5,000 feasibility study for ABC Construction as a means for affordability and near net-zero energy new homes; \$5,000 for other consulting at direction of workgroup, such as advanced building code options or development of other retrofit strategies |
| Greening the Grid (Large-scale Transition to Renewable Energy on the Grid) | Greening the Grid | Make recommendation on We Energies DRER or other method for the City to pursue large scale procurement of renewable energy; support development of large scale renewable energy projects such as community solar or other macro-scale changes to our energy supply | \$5,000 review and make recommendations on DRER; review other options under PURPA; provide estimates on scale of renewable energy needed to meet total electrification needs |

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| Finance | Climate Finance chapter (if applicable) + finance discussion in each chapter | Explore feasibility of large scale revenue source to fund multiple activities and make recommendation; develop recommendations for financing in each chapter | \$5,000 if large scale new revenue is to be pursued |
| Transportation and Mobility | Transportation and Mobility | Options include electric vehicle infrastructure and equitable transition to EV's, and policies to support pedestrian/bike centered development or strengthening of transit systems | \$5,000 , for Electric Vehicle readiness plan or large scale public transportation concept UWM student class reports |
| Waste & Sustainable Consumption | Waste and Sustainable Consumption | Identify strategy to dramatically reduce the amount of solid waste produced in Milwaukee's economy, such as shared economy concepts, more efficient platforms to re-use items; or development of a local industry to re-process recycled materials; or promotional or regulatory efforts to support corporate social responsibility with regard to waste; policies to reduce GHG emissions in food supply or public demand for high GHG intensity food items | \$5,000 circular economy consultant- can locally collected products be remanufactured locally |
| Land use, Urban Ag, and Reforestation (Carbon sinks) | Land use, Urban Ag, and Reforestation | Tree planting/reforestation plan; Land use planning in accord with SEWRPC recommendations for urban density. | DCD Planning staff |
| Adaption and Climate Resilience | Adaption and Climate Resilience | Preparing for extreme storms and reducing the urban heat island effect. | MMSD sustainability and resilience staff; in-kind support from Center on Wisconsin strategies and UW scientists; All Hazards Mitigation Plan |

| VII. High Level Timeline and Milestones | | |
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| | Milestone (end date) | |
| Month | Strategy Development | Education and Outreach |
| Jan 2021 | Workgroup memberships finalized and begin work; explore MOU with We Energies | Outreach to Environmental and other Stakeholder organization to inform them of effort |
| March 2021 | Workgroups produce “menu” of strategies with support from ICLEI and other climate experts; CCTFCEE sets priorities for possible MOU with We Energies | Finalize Climate Vulnerability Report; begin Vision Outreach to Public- What Climate Change means to you |
| | | March -April 2021: Distribute interview questions to stakeholders and public more broadly through social media and other channels; share preliminary feedback with CCTFCEE. |
| May 2021 | Workgroups should prioritize ideas and coalesce around one big idea per chapter | Report public feedback to working groups: high level themes of “what resonates” |
| May-July 2021 | | Strategy Outreach to Public to help prioritize and refine projects through surveys, focus groups and other methods. |
| Aug-October | Prioritize and Refine policy or program proposals, with eye toward one big idea in each chapter | |
| December 2021 | Bring Climate and Equity Plan <i>Framework</i> to Council and County Board for Adoption | |
| May 2022 | Government agencies request funding for proposed programs | |
| July 2022 | Plan Drafted | Publish Draft Plan on City Website |
| September 2022 | Plan adopted | |
| Nov 2022 | Plan elements funded as part of City and County Budgets | |
| Jan 2023 | Programs and Policies implemented | |

| VIII. MEASURES OF SUCCESS | | | |
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| Success Measure # | Description | How Measured | Deadline to Achieve [mm/dd/yyyy] |
| 1 | Equitable, diverse, and inclusive planning process | Quantity and diversity of community feedback received; Task Force to determine whether to track demographic data in surveys and working group discussions | 12/31/2022 |
| 2 | Understandable and actionable climate and equity strategies | Ensure all plan recommendations follow specific, measurable, attainable, realistic, time-bound, inclusive and equitable ('SMARTIE') format. Provide one 'big idea' per chapter that can be supported and potentially funded by the Mayor, County Executive, Common Council, and County Board. | 12/31/2022 |
| 3 | Community-wide recognition and support for final plan | Solicit feedback from community during each stage of plan development. Plan adoption (resolution/ordinance) | 12/31/2022 |
| 4 | Plan strategies implemented by 2023 | At least two major climate/equity strategies are funded and implemented by 2023 as a direct result of this project | 6/30/2023 |
| 5 | Improved equity and climate protection in Milwaukee | Begin implementing plan; report progress to the community at least once every two years. Update GHG inventory every five years. | 12/31/2024 |

| IX. PROJECT CONSTRAINTS & ASSUMPTIONS | |
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| Constraint / Assumption # | Description |
| 1 | The City and County are managing other major change management initiatives (addressing racial equity, responding to COVID-19, returning revenues from the State, etc.). The success of this project depends on the capacity of the City and County to absorb additional change. |
| 2 | Some climate and equity strategies will require policies and actions by other actors, particularly utilities and State government. Thus, buy-in from these businesses is essential to the success of the plan. |
| 3 | In light of #1, this Charter assumes that the project team will coordinate closely with related City and County initiatives (racial equity, COVID-19, etc.) to help ensure the project's success. |
| 4 | The project teams' effectiveness and availability may be constrained due to existing work responsibilities and/ or the need to obtain appropriate capacity and skills. |
| 5 | It is assumed City and County departments are ready and willing to adopt new or expanded climate and equity strategies. |
| 6 | Availability of financial resources. Wisconsin Local governments are very limited by state law in their ability to raise new revenue. |

| X. PROJECT FUNDING | | | |
|---------------------------|--|--|---------------|
| Funding Source | Fund | Description | Amount |
| 1 | Brico Fund (pending grant award) | Community outreach | \$22,800 |
| 2 | City of Milwaukee ARRA funds | GHG inventory and reduction strategy | \$45,000 |
| 3 | City of Milwaukee Climate Plan fund | Green jobs mapping, misc. policy analysis and recommendations, and graphic design | \$50,000 |
| 4 | City and County of Milwaukee General Funds | Staff time of Environment Collaboration Office and County Office of Environmental Sustainability | |
| Total Funding | | | \$117,800 |

| XI. PROJECT EXPENSES | | |
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| Describe the expenses required to complete the project including all labor. | | |
| Expense # | Description | Amount (\$) |
| 1 | Clean Wisconsin climate vulnerability materials (Pending grant) | \$4,950 |
| 2 | Online video platform and video production (pending grant) | \$9,000 |
| 3 | Paid marketing (social media, billboards, radio), (pending grant) | \$7,850 |
| 4 | Public meeting materials (if in person meetings are allowable in latter half of 2020) | \$1,000 |
| 5 | GHG Inventory (Complete) | \$4,950 |
| 6 | ICLEI GHG Strategy Scenario planning | \$18,920 |
| 7 | Advanced Building Construction Feasibility Study ² (Buildings workgroup) | \$5,000 |
| 8 | Secondary Building Consultant, such as advanced building codes (Buildings Workgroup) | \$5,000 |
| 9 | Carbon Fee/New Revenue Study (Finance Workgroup) | \$5,000 |
| 10 | Green Jobs Pathways Map (Jobs and Equity Workgroup) | \$5,000 |
| 11 | Circular Economy consultant (Waste and Sustainable Consumption) | \$5,000 |
| 12 | Greening the grid consulting | \$5,000 |
| 13 | Graphic design and layout of plan | \$25,000 |
| 14 | Transportation and Mobility Consulting | \$5,000 |
| 15 | Equity consulting (e.g., diversity and inclusion analysis of plan documents, marketing to women and people of color) | \$5,000 |
| 16 | Green Manufacturing Plan to develop a concept plan for local manufacturing of a green product outlined in another chapter. For example, the Green Buildings group may recommend panelized or modular green buildings, built in Milwaukee. The Waste/Sustainable Consumption group may recommend reprocessing plastic locally into a marketable commodity. This Chapter could outline a public-private partnership to support a venture like this. | \$5,000 |
| 17 | Miscellaneous expenses (as needed) | 1,130 |

² The U.S. Department of Energy's [Advanced Building Construction](#) (ABC) Initiative integrates energy-efficiency solutions into highly productive U.S. construction practices for new buildings and retrofits. The ABC Initiative is developing building technologies that can be deployed quickly with minimal onsite construction time, are affordable and appealing to the market, and increase the productivity of the construction industry, such as through panelized construction. ABC Initiative coordinates key building sector stakeholders to tackle related challenges, including workforce training, business models, demand growth, and service delivery.

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| Total Expenses | \$117,800 |
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| XII. PROJECT DETAIL TIMELINE <i>(List the major project milestones. Describe what will be delivered for each milestone and when it will be delivered.)</i> |
| See project Gantt chart. |

| XIII. HIGH-LEVEL RISKS <i>(Identify the high-level project risks and the strategies to prevent them from becoming issues.)</i> | | |
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| Risk # | Description | Management Strategy |
| 1 | Lose interest and/or participation of community members | <p>Work with City and County leadership to communicate the importance and urgency of addressing climate change, and racial and income inequity.</p> <p>Schedule regular public outreach to ensure plan reflects community needs and interests.</p> |
| 2 | Fail to connect climate and equity plan with existing plans and strategic initiatives | Discuss complementary plans and initiatives with the managing organization(s) and explore opportunities to collaborate with them. |
| 3 | City and County can't absorb additional change management initiatives | <p>See strategy under #2.</p> <p>Additionally, allow time for plan implementation to support adjustment by City and County.</p> |

XIV. PROJECT COMMUNICATION ACTIVITIES

(Describe the project’s communication activities that will be conducted to ensure there is effective project communications among the Sponsor(s), the members of the project team including the project manager, and other key stakeholders (see Project Roles & Responsibilities)

| Activity # | Meeting | Participants | Frequency | Managing Person or Group | Document Distribution / Retention Methods |
|-------------------|---------------------------------|---|-------------------------|--|---|
| 1 | Task Force | Task Force members Work Group members Community members | Every two weeks | Co-Chairs | Email / Legistar/ECO Facebook /Listserve |
| 2 | Work Group | Work Group members Community members | At least Monthly | Work Group Chairs (Task Force members) | Email / Legistar/ECO Facebook |
| 3 | Project Management | Project Manager Project Assistant Co-Chairs (as needed) | Weekly | Project Manager | Teams / SharePoint |
| 4 | Public Info & Feedback Sessions | All project team members Community members | See project Gantt chart | Project Manager | Email / Legistar/ECO Facebook |
| 5 | City/County Committees | All project team members Community members | As needed | Project Manager (City meetings) Project Assistant (County meetings) | Email / Legistar |