

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

I. PROJECT INFORMATION			
<b>Co-Sponsors</b>	City of Milwaukee Milwaukee County		
<b>CCTCCEE Co-Chairs</b>	Alderman Nik Kovac Supervisor Supreme Moore Omokunde		
<b>CCTFCEE Members (Steering Committee)</b>	(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		
<b>Project Manager</b>	Erick Shambarger City of Milwaukee, Environmental Collaboration Office <a href="mailto:eshamb@milwaukee.gov">eshamb@milwaukee.gov</a> 414-708-9187		
<b>Working Groups</b>	Working groups comprised of Steering Committee members, representatives from relevant government agencies, business, and academia, and other community stakeholders. Workgroup sign-up form is <a href="#">here</a> . Working groups are open to public stakeholders who are committed to advancing climate and equity action in the public interest.		
<b>Project Public Facing Website</b>	<a href="http://milwaukee.gov/ClimatePlan">milwaukee.gov/ClimatePlan</a>		
<b>File Sharing/Project Management Platform</b>	Microsoft Teams for file sharing and as preferred source for video meetings. Teams provides a complete project management platform. Subcommittees may use Zoom or other video services for meetings		
<b>Project Charter Version</b>	<b>Version #</b>	<b>Date</b>	<b>Comments</b>
	1.0	12/4/2020	First draft, for discussion

II. PURPOSE & GOALS
<p><i>(Describe the current challenges and opportunities that the project is addressing. In your response, please be sure to answer the following four questions:</i></p> <ul style="list-style-type: none"> <li>• <i>What problems will be addressed by the project?</i></li> <li>• <i>What goals will be achieved by the project?</i></li> <li>• <i>What benefits will the project deliver, and which constituencies will receive these benefits?</i></li> <li>• <i>How does the project align with the strategic priorities of the community?)</i></li> </ul>
<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. 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>

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](#)).

The Climate and Equity Plan will provide a roadmap for achieving two goals:

- 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 attainment<sup>1</sup>. 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

*(Describe the scope of the project. The scope defines the boundaries where the project begins and ends. The scope describes what will be delivered including where, when, and how. It describes the services, functions, systems, solutions, or tangible products that are approved by the Sponsor(s) to be created during the course of the project, as well as the business process impacts.*

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

<sup>1</sup> Brookings Institution, 2019.

- (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
- (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
- Discussion of how the strategy will reduce racial disparities or create economic opportunities, especially for people of color
- An identified local funding source that can be used to start and sustain the project
- An explanation of how the strategy could be scaled up with new state or federal 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
- Contain 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**

*(List any deliverables including services, functions, systems, solutions, or tangible products that the sponsor has determined to be outside of the project's scope. It may include specific deliverables to be created during a future project.)*

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 that are unrelated to climate change.

<b>V. PROJECT ROLES &amp; RESPONSIBILITIES</b>		
<i>(List project team members and other stakeholders)</i>		
<b>Individual or Group Name</b>	<b>Role</b>	<b>Responsibilities</b>
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 Group	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 and risks; maintain project documents; report project status; facilitate conflict resolutions within project
Luke Knapp	Legislative Analysis	Perform legislative research needs
Linda Elmer	Staff Assistant	Post public meetings 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.
TBD	Consultant	Provide graphic design, layout and finishing of Climate and Equity Plan
General Public	Provide validation and high-level feedback	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

		interview platform, surveys, and public comment at meetings.
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<b>VI. Working Group Responsibilities</b>			
<b>Working Group</b>	<b>Plan Chapter</b>	<b>Description of Work</b>	<b>Resources</b> <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 <a href="#">DOE's Workforce Accelerator</a>	<b>\$10,000 consulting;</b> \$5,000 for Green Jobs map, +\$5,000 for <a href="#">equity mapping</a> 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	<b>\$22,800</b> (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;	<b>\$10,000</b> , including \$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
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	<b>\$5,000</b> review and make recommendations on DRER; review other options under PURPA; provide estimates on scale of renewable energy needed to meet total electrification needs

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	<b>\$5,000</b> 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	<b>\$5,000</b> , for Electric Vehicle readiness plan or large scale public transportation concept UWM student class reports
Waste & Sustainable Consumption	Waste and Sustainable Consumption  (Rename, "Circular economy"?)	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	<b>\$5,000</b> 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

<b>VII. High Level Timeline and Milestones</b>		
	<b>Milestone (end date)</b>	
<b>Month</b>	<b>Strategy Development</b>	<b>Education and Outreach</b>
Jan 2021	Workgroup memberships finalized and begin work	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	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 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

*(Describe what success looks like for the project. How will the Sponsor(s), Functional Owner and Technical Owner know that the products and services created by the project have addressed the problems, delivered the needed benefits to members of the community, and achieved the goals that are described in the Purpose section of this Charter?)*

<b>Success Measure #</b>	<b>Description</b>	<b>How Measured</b>	<b>Deadline to Achieve</b> [mm/dd/yyyy]
1	Equitable, diverse, and inclusive planning process	Quantity and diversity of community feedback received	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.	12/31/2024

## IX. PROJECT CONSTRAINTS & ASSUMPTIONS

(List the known and anticipated constraints, and the initial assumptions for the project.)

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

(What are the sources of funding to conduct the project? For each funding source, indicate the amount of funding that will be provided. If the funding source is a grant, indicate this in the *Name* column.)

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
Total Funding			\$117,800

<b>XI. PROJECT EXPENSES</b>		
Describe the expenses required to complete the project including all labor.		
<b>Expense #</b>	<b>Description</b>	<b>Amount (\$)</b>
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 <sup>2</sup> (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 local manufacture sustainability product from plan, eg from Advanced Building Construction/panelized housing from Buildings group or reprocessed material from Waste/Sustainable Consumption group)	\$5,000
17	Miscellaneous expenses (as needed)	1,130
<b>Total Expenses</b>		<b>\$117,800</b>

<sup>2</sup> 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.

**XII. PROJECT DETAIL TIMELINE**

*(List the major project milestones. Describe what will be delivered for each milestone and when it will be delivered.)*

See project Gantt chart.

**XIII. HIGH-LEVEL RISKS**

*(Identify the high-level project risks and the strategies to prevent them from becoming issues.)*

<b>Risk #</b>	<b>Description</b>	<b>Management Strategy</b>
1	Lose interest and/or participation of community members	Work with City and County leadership to communicate the importance and urgency of addressing climate change, and racial and income inequity.  Schedule regular public outreach to ensure plan reflects community needs and interests.
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	See strategy under #2.  Additionally, allow time for plan implementation to support adjustment by City and County.

**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)*

<b>Activity #</b>	<b>Meeting</b>	<b>Participants</b>	<b>Frequency</b>	<b>Managing Person or Group</b>	<b>Document Distribution / Retention Methods</b>
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