



Employ Milwaukee Administrative Memo			
Issue Date:	4-19-17	#	17-1
Routing:	CEO	Ex. VP	CFO
	CPO	CMO	ALL STAFF

TO: Employ Milwaukee Staff

FROM: Scott Jansen, Executive Vice President

RE: Contribution, Sponsorship and Membership request Review and Approval process

PURPOSE: To consistently evaluate requests for contributions, sponsorships or memberships and to ensure that agency expenditures conform to funding source allowable cost parameters.

BACKGROUND: Employ Milwaukee’s funding sources, including the Wisconsin Department of Workforce Development (DWD) and the U.S. Department of Labor (DOL), stipulate rules for the usage of funds for workforce development purposes. These rules identify allowable costs to be incurred and/or expenses to be reimbursed. Employ Milwaukee receives requests from external parties and community stakeholders for the purchase of memberships, event tickets, sponsorships or contributions. In addition, Employ Milwaukee staff may become aware of a sponsorship or membership opportunity which they believe to be of value to the agency.

ANALYSIS: In order to objectively evaluate and prioritize allowable membership, sponsorship and contribution opportunities, and to comply with expenditure restrictions set forth by Employ Milwaukee’s funding sources, it is recommended that all such requests be reviewed by the Chief Financial Officer (CFO) to determine whether the request is an allowable expense or if agency discretionary funding are available for use. If the request is deemed an allowable expense or discretionary funds are available, the request should be reviewed by the agency Executive Team to prioritize opportunities and commitments. Until Executive Team approval is received, no employee should commit agency resources to funding requests.

POLICY: Effective immediately, the following process must be followed prior to requesting payment for memberships, events, and sponsorships:

1. All requests are emailed to the Chief Financial Officer with an attachment or one paragraph description from the EMI employee who received the request.
2. Chief Financial Officer will review the requests to see if the costs are allowable or if discretionary funding is available.
3. The Executive Team will review requests approved by the CFO to determine value.
4. If approved by E-Team, the agency requestor may prepare a payment request and notify the organization of Employ Milwaukee’s intent to fund.
5. The Director of Research and Planning will forward information for inclusion in the Stakeholder Inventory spreadsheet to document and aid in future planning.

CONTACT: Patti Porth, Chief Financial Officer, patti.porth@employmilwaukee.org

ATTACHMENTS: N/A