

COUNTY OF MILWAUKEE
Inter-Office Communication

Date: December 18, 2025

To: Supervisor Marcella Nicholson, Chairwoman, Milwaukee County Board of Supervisors

From: Jaci Bobo, Director and Chief Information Officer, Information Management Services Division, Department of Administrative Services

Subject: Report from the Director and Chief Information Officer, Department of Administrative Services – Information Management Services Division (DAS-IMSD), providing an informational report on technology procurement processes for Milwaukee County.

File Type: Informational Report

BACKGROUND

At the September 2025 Committee on Audit meeting, the committee requested DAS-IMSD to provide a report and presentation on technology procurement processes at the County and how DAS-IMSD works to limit duplicate technology platforms.

County Administrative Manual of Operating Procedures (AMOP)

AMOP 15.01 – Contracting Administration Process, outlines the policy, objectives, and procedures for the County's contracting process. Within the AMOP, cross-functional team roles and responsibilities are outlined in Appendix J, which includes the following DAS-IMSD roles and responsibilities:

- IMSD's review of technology purchases (hardware, software, and subscription services) is required prior to execution of a contract. For purchases that require a bid or RFP, IMSD's review is required prior to issuance of the bid or RFP. Procurement will coordinate with IMSD to ensure proper review and approval via IMSD's Architectural Review Committee (ARC).
- Draft, review and approve, and negotiate technology requirements for inclusion in contracts, bids, and RFPs.
- Draft, review, approve, and negotiate special terms related to cybersecurity, IT security, data security, etc.
- Draft, review, approve, and negotiate service level agreement (SLA) terms for delivery of technology goods and services.

DAS-IMSD Procurement Personnel

To support County departments and divisions in the solutioning and procurement of technology, DAS-IMSD relies on two main teams:

1. **IT Governance** – Responsible for the oversight of IT administrative and strategic functions and works directly with departments and third parties to perform IT Financial Management, Vendor Portfolio Management, and Vendor Performance Management, among other administrative functions.

The IT Governance function consists of the Deputy CIO with an IT Contracts Manager and two IT Financial Analysts.

2. **Business Relationship Management** – Strengthens alignment between IT services and department business objectives, ensuring technology investments deliver tangible value, support the operations of Milwaukee County, and enable innovation. This team is responsible for proactive engagement and strategic planning with departments.

The Business Relationship Management function consists of the Director of Business Relationship, two Business Relationship Managers (BRMs), and multiple Business Development Analysts (BDAs). Each department is assigned a BRM and a BDA for coordination on technology needs.

DAS-IMS also conducts weekly meetings of the Architectural Review Council (ARC) to ensure the right people, process, and technology solutions are implemented to support the County's needs. ARC's purpose is to:

- Understand Milwaukee County's infrastructure and underlying business processes, applications, and data.
- Define technologies upon which systems, applications, and IT infrastructure are built to support the business process.
- Set guiding principles based on the defined technologies.
- Define Enterprise Architecture (EA) roadmaps to support Future State Decisions.
- Ensure that new and existing solutions and changes to existing solutions are consistent in supporting the strategic, financial, and security objectives of Milwaukee County.
- Responsible for overseeing architectural requests and guaranteeing compliance with regulations and standards.
- Ensure any changes to the IT ecosystem are vetted, validated, and fall under the guidelines of the County's governance, best practices, and relevant IT standards.
- To mitigate risks, ARC follows well-defined, objective processes, enforce rules uniformly, and respond to requests in a timely manner.

Technology Budgets

The County funds technology purchases through a variety of agencies and orgs. At a high level, these are:

- Agency 116 – DAS-IMSD – Separate agency and fund (internal services fund) for IMSD employees, training, Countywide infrastructure (e.g., Microsoft, infrastructure hosting providers, network connectivity, security tools, etc.).
- Agency 115 (DAS) – Central Spend Orgs – An operating budget, within Agency 115 (DAS), allocated for recurring software license and maintenance costs and non-capital IT hardware initiatives.
- Agency 120 (Capital) – Technology purchases for departmental capital projects and DAS-IMSD capital projects.
- Departmental Operating Budgets – Departments fund the end user device purchases for net new positions through IMSD procurement processes. These devices are then included in future DAS-IMSD capital lifecycle projects. Departments are also responsible for purchasing of ancillary user equipment and / or consumables (e.g., web cams, keyboards, USB drives, etc.).

DAS-IMSD Technology Purchasing – Contracted Purchases

The IT Governance team currently manages over 350 agreements (e.g., Non-Disclosure Agreements, Master Services Agreements, Statements of Work, etc.), and this number is increasing. DAS-IMSD's involvement in the contracting process is crucial to help ensure key risks associated with technology purchases are managed, including:

- Service Level Agreement (SLA) Clauses;
- Data Protection (e.g., public records requirements, geo-restrictions, no data sharing, etc.);
- Standards and Regulations Compliance (e.g., CJIS, PCI-DSS, HIPAA, etc.);
- AI-Related Protections (e.g., do not use County data for model training); and
- Audit Terms and Conditions (e.g., standard County audit clause, specific IT audit clauses, where appropriate).

In Q1 2026, DAS-IMSD IT Governance will start a project to review and update DAS-IMSD standard terms and conditions with industry best practices.

DAS-IMSD Technology Purchasing – Non-Contracted Purchases (i.e., Punchout Vendors and Purchase Requisitions)

County technology can also be purchased via the Infor punchout vendor process and other purchase requisitions. To monitor these types of purchases, DAS-IMSD implemented controls within the Infor ERP application to flag, review, and approve or

reject purchases based on technology commodity codes.

One area of purchases that DAS-IMSD does not have visibility into are departmental purchase card (P-Cards). DAS-IMSD is currently in ongoing discussions with the Office of the Comptroller and DAS-Procurement for evaluation of possible solutions.

Technology Consolidations and Optimizations

DAS-IMSD continually works to consolidate and optimize County technologies, both from a cost perspective and from a value perspective. Multiple projects have been completed, including with Milwaukee Mitchell International Airport (MMIA), UW Extension, County Board, and the Office of the County Executive. Additionally, numerous programs and projects are in process, including with DHHS, Digital Transformation, and DAS-IMSD.

Additional details on these programs and other information in this report are available in the attached presentation. We look forward to the Committee's input, discussion, and feedback.

ALIGNMENT TO STRATEGIC PLAN

The creation of the Business Intelligence Analyst position will support the Department of Administrative Services – Information Management Services Division's alignment to the strategic plan areas:

- 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,
- 3B – Enhance the County's fiscal health and sustainability, and

FISCAL EFFECT

The report is informational only and has no tax levy impact.

VIRTUAL / HYBRID MEETING INVITES

- Jacqueline Bobo – Director and Chief Information Office, Information Management Services Division, Department of Administrative Services
- Matt Johnson – Deputy Chief Information Officer, Information Management Services Division, Department of Administrative Services

PREPARED BY:

Matt Johnson – Deputy Chief Information Officer, DAS-IMSD

APPROVED BY:

Jacqueline Bobo

Jaci Bobo

Director and Chief Information Officer
DAS – Information Management Services Division

Aaron Hertzberg

Aaron Hertzberg

Executive Director Administrative Services
Department of Administrative Services

ATTACHMENTS:

Audit Committee Technology Procurement Presentation – 2026-01

cc: Amy Turim, Deputy Director Administrative Services, Department of Administrative Services
Isaac Rowlett, Interim Director, Office of Strategy, Budget, and Performance
Liz Sumner, Comptroller, Office of the Comptroller
Jim Moon, Deputy Comptroller, Office of the Comptroller
Jen Folliard, Director of Audits, Office of the Comptroller