

City of Milwaukee  
Department of Administration – Purchasing Division

## Request for Proposal (RFP) #21629



### Vendor Service Contract for Electronic Records Management System Design Study and Needs Assessment

### Scope of Work

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Submissions must be submitted on the Bonfire portal prior to the **closing time of  
Tuesday, February 17, 2026 at 4:30 PM CT**

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## 1.0 INTRODUCTION

The purpose of this Request for Proposal (RFP) is to solicit proposals for a design study and information ecosystem analysis for the City of Milwaukee, in preparation for procurement and implementation of an enterprise record management system/content services platform.

## 2.0 BACKGROUND

The City of Milwaukee records management program is managed from the City Records Center (CRC), which manages records inventory for all city departments in accordance with official record retention schedules. CRC was originally envisioned as part of the Document Services Section (DSS) of the Milwaukee Department of Administration (DOA), in which capacity the office also has run the city's copy center (defunct), print shop (defunct), mail room (ongoing), and imaging program (microfilming until c. 2000, digital imaging 2000-Present). The records program is authorized and overseen by the City Information Management Committee (CIMC), a statutory governance committee of the Milwaukee Common Council with membership appointed by designated administration officials. CIMC approves records schedules, records, and information-related policies, IT and information security-related policies, and receives updates from the city records officer and the chief information officer about developments in city records management and city information technology services.

The current records and information paradigm derives from a model of paper-based records primacy that no longer exists. In the last decade in particular, it has become increasingly difficult for CIMC to create retention and management policies that City employees are bound to or able to respect, due to the rise of user-based systems for managing both structured and unstructured data. These systems are largely not interconnected and exist in various states of transparency. City Records has only the level of access to unstructured data as is granted by end users, and is largely unable to explore the records needs of most structured data systems. The DOA - Information Technology Management Division (ITMD), meanwhile, controls the infrastructure and administration of most City information systems, but has only a narrow view of the information management issues of the data handled therein—primarily in terms of data security and loss prevention.

Data systems, particularly structured data systems, are highly siloed throughout the organization, a result of an only partially centralized IT infrastructure and a reliance on contractors to manage critical information needs. Systems for unstructured data, such as the Microsoft 365/SharePoint/Teams suite, saw a rapid expansion of use during the active phase of the COVID-19 Pandemic (2020-2021), and governance associated with those systems was primarily advisory in nature, resulting in a mass proliferation of redundant, obsolete, and transitory records and a lack of staff time or expertise to get it under control after the fact. On the structured data side, major systems such as the Land Management System (Accela) and the Enterprise Resource Planning system (Workday) have been implemented or are soon to be implemented without serious consideration of records and data governance needs. There is little, if any, document or records management capability within these systems. Their ability to interface with existing systems is limited to metadata export, and their planned operation encourages over-retention of records and data. The City does not currently have a data lake or data warehouse to store data outside of these systems, and encourages cross-functional sharing and analysis of critical operations metrics.

A significant challenge from a records management perspective is the inflexibility of the City's existing enterprise content management system, which serves as the official electronic repository for City records. The system was originally provisioned and configured to store static, scanned copies of paper documents. While it continues to function adequately in that limited role, the growing volume of electronic and born-digital records has exceeded its capabilities.

In particular, the system struggles to meet the requirements of active records management, including reliably capturing records and moving them through established workflows. Because of its original licensing and configuration, integrations with line-of-business systems are largely limited to metadata exports for indexing purposes, requiring users to access documents in a separate application in most cases. In an era where Integration Platform-as-a-Service (IPaaS) solutions are standard, this fragmented experience is unacceptable. Consequently, many users and imaging application contacts have ceased using the system altogether.

It is City Records' intent to procure an IPaaS/Content Services Platform/Enterprise Records Management System to provide a single records repository and Source of Truth for City records and information management. Under this system, records and data would be available for sharing and reuse citywide and would be retained and disposed of according to records retention rules, state statute, and industry best practices. As it stands, however, the City's information ecosystem is so fragmented that it is not even clear what records are being maintained by City departments, what systems (official or otherwise) they are using, and what their particular needs are around information management. In the interest of procuring and implementing a product that will meet the actual needs of its intended users, the City is first soliciting a comprehensive analysis of our existing citywide information ecosystem.

### 3.0 SCOPE OF WORK

The City of Milwaukee is requesting proposals for a design study, needs assessment, and gap analysis of its records and information management requirements, to be used as baseline information for procuring and implementing an enterprise records management system (or equivalent). This study should focus primarily on electronic records, both born-digital and digitized. To the extent that physical records are addressed by this project, they should be addressed in the context of automating business processes and digitizing, ingesting, and managing the records in electronic form. Respondents will be expected to come on-site to interview stakeholders, assess information systems, etc., but remote engagements may also be considered if the study design is compelling.

#### 3.1 Department-level Analyses

Because of the diversity of function, structure, records, and information complexity, and existing program maturity, we are specifically requesting analyses for at least each major (Cabinet-level) department within the City of Milwaukee Government. These include:

- Common Council-City Clerk (Legislative Branch)
- Office of the Mayor
- Department of Administration (DOA)
- Department of Employee Relations (DER)
- Fire and Police Commission (FPC)
- Employees' Retirement Systems (ERS)

- Department of City Development (DCD)
- Department of Neighborhood Services (DNS)
- Department of Public Works (DPW)
- Milwaukee Health Department (MHD)
- Milwaukee Municipal Court
- Milwaukee Elections Commission
- Office of the City Comptroller
- Office of the City Treasurer
- Office of the City Attorney
- Milwaukee Public Library
- Fire Department
- Police Department

These analyses are intended to identify existing records and structured and unstructured data resources and workflows within and between these departments. At a minimum, these analyses should include:

- An overview of records-producing business processes and their concordance with existing general and department-specific retention schedules
- An inventory and analysis of structured and unstructured data storage locations (including physical media, local network storage, SharePoint/OneDrive/Teams, and other cloud storage locations) and their organization/architecture
- Identification of departmental records policies and procedures and suggestions for compliance improvements
- Identification of integrations and interactions with other departments and systems (City of Milwaukee or external)
- Data access, security, and privacy points of vulnerability  
Gap analyses for information

### **3.2 Enterprise Systems Analysis**

In addition to analyzing the information management needs of individual departments, the City is seeking an assessment of enterprise-level information systems and core business functions. This assessment shall include recommendations for integrating such systems with an enterprise records management system, content services platform, Integration Platform-as-a-Service (IPaaS), or comparable technologies.

The City currently utilizes a range of enterprise systems, including, but not limited to, the following:

- Microsoft 365 suite of products, including OneDrive for Business, Teams, and SharePoint Online
- Microsoft Exchange Email Server
- PeopleSoft HCM and Financial modules transitioning to Workday
- ACA Accela Land Management/Permitting/Licensing System
- JobApsCloud Acquisition and Talent Management System
- Tyler MUNIS Tax Information System
- DocuSign E-Signature Solutions
- GIS Web Services
- Intellinetics Law Enforcement Document Management System
- Gimmel Physical Records Management System

This list is not exhaustive. Additional systems and integration opportunities may be identified through departmental consultations and discovery activities conducted as part of this engagement.

At a minimum, the enterprise systems analysis should include:

- Analysis of records and data lifecycle within the system
- Analysis of cross-departmental business processes and their concordance with existing general and department-specific retention schedules
- Identification of duplicative data or processes and opportunities for consolidation
- Identification of integrations and integration opportunities with other systems (City of Milwaukee or external)
- Data access, security, and privacy points of vulnerability
- Review of legal, regulatory, and policy compliance
- Gap analysis for information management/data governance best practices

#### 4.0 DELIVERABLES

The primary deliverable for this project shall be a consultant-prepared report assessing the current state and maturity of the City of Milwaukee's Information Management Ecosystem. The assessment shall evaluate the City's information governance maturity using the Information Governance Maturity Model (IGMM) or a comparable, industry-recognized framework.

In addition to a current-state assessment and gap analysis, the report shall include a set of clear, actionable recommendations to advance the City's information governance maturity. These recommendations shall address policy, process, and technology considerations and may include guidance related to the procurement and implementation of specific software platforms or solution types.

The consultant report should include these specific components:

- The Department-level information management gap analysis and maturity assessment
- The Enterprise systems-level information management gap analysis and maturity assessment
- Recommendations/Roadmap for procuring and implementing an Enterprise Records Management System (or related technology) to facilitate improved information governance and electronic records management
- Recommendations/Roadmap for non-systems/long-term improvements to information governance and electronic records management

The purpose of this design study is for the selected proposer to recommend a specific enterprise records management or content services platform.

The selected consultant will provide guidance on the recommended software solution, including assisting the City with preparing and issuing an RFP for its procurement. The consultant will not serve as the contractor or reseller for the software.

## 5.0 RFP SUBMITTAL REQUIREMENTS

For this RFP, the City of Milwaukee is using a Bonfire portal for accepting and evaluating proposals digitally.

Upload your submission at: <https://cityofmilwaukee.bonfirehub.com/opportunities/218069>

Your submission must be uploaded, submitted, and finalized prior to the Closing Date and Time of **February 17, 2026, at 4:30 PM CT**. We strongly recommend that you give yourself sufficient time and at least ONE (1) hour before Closing Time to begin the uploading process and to finalize your submission.

## 6.0 STRUCTURE OF RESPONSES

In order to simplify the review process and to obtain the maximum degree of comparability, proposals should be submitted in the following sequence. Failure to comply with these requirements may be cause for the proposal to be considered non-responsive and not receive further consideration.

**Cover Page:** The Cover Page shall include at a minimum, the name and address of the proposing organization or individual and the name, phone number and e-mail address of the contact person. Provide the physical and mailing addresses of your company's main office, the primary point of contact during the proposal evaluation process, a brief history of your company.

**Table of Contents:** The table of contents should identify the material by section, the beginning and ending page number of each section, and any appendices.

**RFP Document and All Addenda:** Proposers are required to sign the original copy of the RFP Invitation, the addenda (unless instructed otherwise), and any applicable affidavits. Digital signatures are acceptable. Proposers are also required to submit all of the pages applicable to the RFP document with their proposal submittal.

**Designation of Confidential and Proprietary Information:** Proposers should identify the sections of their proposal submittal that they would like to be kept confidential. This document should be signed and submitted with the proposal even if they do not designate anything in their proposal as confidential and proprietary.

**Qualifications and Experience:** Proposers are to provide a detailed proposal which demonstrates an understanding of the scope of work and related objectives. The proposal shall include the contractor's approach to providing services outlined. The proposal should also include innovative techniques and documentation of success; Prior experience and familiarity with services required and demonstrate the capacity to meet the requirements of the proposal as contained in this scope of services.

**Resumes:** The names and credentials of the individuals who will be performing the services. Include the credentials of the individuals as they relate to the required and preferred qualifications. Please indicate if capacity currently exists or whether company expansion will be required to provide service.

**License/Certification:** Proposers are to provide a copy of all applicable licenses and certifications.

**References:** Proposers shall provide a listing of three (3) references from contracts that were similar in size and scope to that described herein. The reference information shall include the client’s name, contact person’s name and telephone number, and nature of the work performed.

**Cost Proposal:** The Cost Proposal Documents must be submitted in a **separate file document, clearly marked “COST PROPOSAL DOCUMENTS.”**

**7.0 EVALUATION CRITERIA**

Award will be made to one (1) of the top three (3) highest scoring proposers whose application is determined to be the most advantageous to the City, taking into consideration the score of the proposal based on the following criteria and weights

<b>PASS/FAIL CRITERIA: Compliance with Response Requirements – Structure of Responses Section</b>	<b>PASS/FAIL</b>
Depth and Breadth of proposed analysis - Assesses comprehensiveness and rigor of proposed approach.	20 Points Maximum
Appropriateness and thoroughness of project plan - Evaluates the methodology, milestones, and feasibility of the plan.	20 Points Maximum
Consultant Team composition, expertise and experience - Includes consideration of relevant experience. Previous experience with Workday-related projects will be given special consideration.	20 Points Maximum
References for related consultations with local government - Quality and relevance of references demonstrating prior successful work.	10 Points Maximum
Alignment of proposed approach with City of Milwaukee and departmental business needs - Degree to which the proposed approach meets stated City objectives and requirements.	10 Points Maximum
Cost Proposal	20 Points Maximum
<b>PASS/FAIL CRITERIA:</b> Small Business Enterprise (SBE) participation: This RFP requires participation of an SBE in the amount of 25% in accordance with City of Milwaukee Ordinance Chapter 370 Section 5.  SBE participation is an element of proposer responsiveness. Failure to meet the specified requirements will render the RFP unresponsive, and the Purchasing Division may then recommend award to the next highest ranked proposer.  For further information regarding SBE participation, contact the Office of Equity and Inclusion at 414-286-5553.	<b>PASS/FAIL</b>

<p><b>Bonus Points:</b> If a Local Business Enterprise (LBE) is a responsive and responsible Proposer, an additional five (5) points shall be applied to the total score attained by the LBE Proposer. The Local Business Enterprise Program Affidavit of Compliance form must be submitted in order to qualify for additional LBE points. If an SBE qualifies for the LBE program, an additional ten (10) points may be counted toward the SBE's total cost points.</p>	<p>Up to Ten (10) Additional Points</p>
<p><b>Bonus Points:</b> Proposers who submit a Socially Responsible Proposer (SRC) Affidavit of Compliance, and are found to be compliant, shall be awarded an additional number of points equal to 5% of the maximum number of points used in the evaluation of RFPs. For more information regarding the SRC Program click <a href="#">here</a>.</p>	<p>Up to Five (5) Additional Points</p>

**8.0 RFP TIMELINE**

The following is the proposed schedule for the RFP. The DOA-Purchasing Division reserves the right to change the RFP schedule, issue addenda to the RFP, cancel the RFP, or reissue the RFP at any time.

RFP Release Date	Wednesday, January 28, 2026
Questions Due from Proposers	Monday, February 2, 2026
Answers Posted Online via an Addendum	Friday, February 6, 2026
Closing Date	Tuesday, February 17, 2026
Evaluation of Proposals	Week of February 23, 2026*
Selection of Highest Ranked Proposer	Week of March 2, 2026*
Contract Negotiations	Week of March 9, 2026*
Award of Contract	Week of March 16, 2026*
Commencement of Services	Monday, March 30, 2026*

\* Tentative Dates

**9.0 OTHER**

**Proposal Questions**

Any questions, clarifications, etc. must be sent **via Bonfire (only) at Messages – Opportunity Q&A to the Procurement Specialist, Diana Herrejon no later than Monday, February 2, 2026 at 4:30 PM CT. Questions submitted after the deadline will not be considered. (No exceptions).** Answers to the questions submitted will be posted in the form of an addendum to this RFP no later than Friday, February 6, 2026 at 4:30 PM CT.

**Proposer’s Relationship to the City of Milwaukee**

It is expressly understood that the successful proposer is in all respects an Independent contractor as to the work, and the contractor is in no respect an agent, servant or employee of the City of Milwaukee.

**Insurance**

The successful Proposer will be required to provide the City with evidence of Insurance coverage that is in full compliance with the City's Insurance Requirements. It is the successful Proposer's responsibility to provide its insurance agent with a copy of the City's Insurance Requirements for this RFP. It is also the successful Proposer's responsibility to check the Insurance Certificate before it is sent to the City to verify that these documents are in full compliance with the City's Insurance Requirements. An original copy of the fully compliant Insurance Certificate shall be furnished to the City prior to the contract being fully executed.

**Exceptions**

Any exceptions taken to the Scope of Services should be provided in writing to the Purchasing Agent listed on the cover page of this RFP no later than two (2) weeks prior to the closing date. The written request should include any and all changes or exceptions proposed by the consultant to the requirements detailed in this Request for Proposal. The request shall be under consideration for negotiation and proposed exceptions will not be considered a disqualification of any consulting firm, nor should inclusion of the exceptions be viewed as acceptance by the City, without negotiation. Exceptions not provided in this manner, will not be considered.

**Addenda**

It is the responsibility of the Proposer, prior to submitting a response to the RFP, to periodically check the Purchasing Division webpage to ensure that all addendums for this Request for Proposal have been downloaded and that all of the information, documentation, etc. that has been requested has been included in the RFP response.

**Jurisdiction, Venue, Choice of Law**

This RFP and any resulting contract shall be governed by and construed according to the laws of the State of Wisconsin.

**Follow-up Interviews**

Should the department request follow-up interviews, Proposers must be available for these follow-up interviews/presentations at City facilities or virtually on specific dates and times. The Proposer's and consultant's proposed primary point of contact person must be present at this meeting or during the virtual meeting to lead the interview team.

**Negotiations**

After interviews and final evaluations are completed, the City may at its sole option open negotiations with three or more of the highest ranked Proposers prior to award. The City also reserves the right to open negotiations with one or more of the next highest ranked Proposers if negotiations with one or more of the previously selected highest ranked Proposers are not successful.

**Incurred Costs**

Those Proposers submitting proposals do so entirely at their expense. There is no expressed or implied obligation by the City to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, for providing additional information when requested by the City or for attending and/or participating in any follow-up interviews and negotiation sessions.

**Confidential Matters**

- **City Data:** All data and information pertaining to this RFP, shall be treated by the Proposer and its agents as confidential. The Proposer and its agents shall not disclose or communicate the aforesaid matters to a third party or use them in advertising, publicity, propaganda, and/or in another job or jobs, unless written consent is obtained from the City.
- **Vendor Data:** If any information submitted in the proposal is confidential or proprietary, the Proposer must identify this information by completing and including the Designation of Confidential and Proprietary Information with their proposal.

**Assignment**

The Proposer may not reassign any portion of the work that is awarded as a result of this RFP, without prior written consent from the City.

**Rejection**

The City reserves the right to reject any and all proposals, to waive any informality in the proposals that are received, to accept or reject any or all items in the proposal, and to award contracts to three or more Psychological Evaluation firms and Appeal Process Handling firms in whole or in part. Moreover, the City reserves the right to make no selection if the proposals are deemed to be outside the fiscal constraint or not in the best interests of the City.