

# **City Information Management Committee 2024 Annual Report**

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*This report is submitted pursuant to s. 320-1 of the Milwaukee Code of Ordinances.*

**Purpose: (Per s. 320-31 of the Milwaukee Code of Ordinances)**

*The City Information Management Committee recommends policies and guidelines to the Mayor and Common Council for management of the City's information resource, promote interdepartmental and intergovernmental sharing of information resources, and promulgate guidelines for development and maintenance of City records.*

**MEMBERS**

1. **Chairman Alderman Scott Spiker**, Common Council  
*Previously Alderman Mark Borkowski*
2. **Vice-chair, David Henke**, Chief Information Officer
3. **Jennifer Meyer-Stearns**, Assistant Director-Library Operations, Mayoral Designee
4. **David Klein**, Systems Support Manager, City Comptroller Designee
5. **Margarita Gutierrez**, Special Deputy City Treasurer, City Treasurer Designee  
*Previously James Klajbor, Deputy City Treasurer*
6. **Jim Owczarski**, City Clerk
7. **Judy Siettmann**, IT Security & Audit Compliance Analyst, Dept. of Admin. Designee
8. **Robert Jaeger**, Library Services Manager, City Librarian Designee
9. **Timothy Richter**, IT Manager, Municipal Court Designee
10. **Jeffrey Madison**, IT Manager, Fire Chief Designee
11. **Jeff Larson**, Police Information Systems Director, Police Chief Designee
12. **James Zimmer**, Water IT Manager, Dept. of Public Works - Water Works Designee

**STAFF**

1. **Bradley Houston**, City Records Officer, Staff Support
2. **Peter Block**, Assistant City Attorney, Legal Advisor
3. **Travis Gresham**, Assistant City Attorney, Legal Advisor
4. **Chris Lee**, Staff Assistant, City Clerk, Clerical Support

## **MEETINGS HELD**

March 7, 2024  
June 6, 2024  
September 5, 2024  
December 12, 2024

*Complete agendas and minutes of these meetings can be found at <https://milwaukee.legistar.com/Calendar.aspx>.*

## **MEMBERSHIP CHANGES**

Margarita Gutierrez jointed as a new designee member in November 2024 replacing James Klajbor.

Ald. Scott Spiker joined as a new member and chair in December 2024 replacing Ald. Mark Borkowski.

## **ITEMS DISCUSSED OR REVIEWED**

### **2023 Annual Report**

The report of activities of the City Information Management Committee for 2023, as prepared by clerk staff, was approved by the committee at its March 7, 2024 meeting. The report can be found within file number [231717](#).

### **2025 Meeting Schedule**

Barring any issues the committee approved, at its December 12, 2024 meeting, the committee meeting schedule for the 2025 year to be for the following dates and times: March 13 at 10 a.m., June 5 at 10 a.m., September 4 at 10 a.m., and December 4 at 1 p.m.

### **City Records Center**

#### **Data and Information Governance**

At the March 7, 2024 meeting, an update was given on mitigation efforts of the City Records Center. Efforts included upgrading and adding storage to Municipal Court SQL, trainings on e-vault and collections for electronic records, communication with vendors to survey data loss prevention and records management, and ongoing communication with vendors on creating an ERMS system for the City. The committee discussed goals and efforts to reduce and secure records.

At the December 12, 2024 meeting, an update was given on the capital request not being granted for a data loss prevention system and on other options to acquire tools to assess the City's data

sources and location. Conversations were being had with vendors on recommendations. The committee discussed advancing a work group to oversee IT data and AI advancement and clarify data ownership, advance the AI policy to be approved by the Common Council, and increase awareness of the Data Governance Policy.

### **Record Retention Schedules for Approval**

All 145 schedules were approved at the March 7, 2024 meeting. Included in the schedules were MPD closed schedules and schedules relating to DNS condemnation files, Municipal Court parking tickets, food inspection placards, and MPD property inventory records. Further details on the retention schedules can be found within file number [231717](#).

All 383 schedules were approved at the June 6, 2024 meeting. Included in the schedules were schedules relating to payroll time keeping records, contract and charter school records, city property management files, water quality data, and compliance loan program files. Further details on the retention schedules can be found within file number [240203](#).

All 71 schedules were approved at the September 5, 2024 meeting. Included in the schedules were schedules for certificate of records destruction and related records (global); FMLA chronological files (global); MPD narcotics burn folder, loud car stereo citizen complaint forms, and OWI citation records; ERS investment bond registers; and tax deed foreclosure files. Further details on the retention schedules can be found within file number [240639](#).

All 62 schedules, a majority for DPW and MPD records, were approved at the December 12, 2024 meeting. Included in the schedules were schedules relating to consolidation of legal records and documents, search warrant and arrest warrant records, and ERS investment consultant reports. Further details on the retention schedules can be found within file number [241228](#).

### **State Record Board Approval of Previous Schedules**

At the March 7, 2024 meeting, it was reported that the State Records Board had approved all schedules from the December 7, 2023 meeting with clarification made to 4 schedules.

At the June 6, 2024 meeting, it was reported that the State Records Board had not yet approved but would approve at its next meeting the previous schedules from March 7, 2024 with some changes. Changes included various minor corrections, changing the retention period of the schedule on water quality data, and withdrawing the transitional records relating to department garage parking tickets.

At the September 5, 2024 meeting, it was reported that the State Records Board had approved all schedules from the June 6, 2024 meeting with minimal changes made.

At the December 12, 2024 meeting, it was reported that the State Records Board had approved all schedules from the September 5, 2024 meeting except the schedule pertaining to tax deed foreclosure files, which would be resubmitted with legal review.

## **Departmental Updates**

At the March 7, 2024 meeting, various updates were given. Updates included the migration to Systems Innovators Cloud and Tyler Technologies for the City Treasurer's Office; transition to iLegislate online product, licenses going live in LMS, and ad-hoc LRB memorandums to support the Common Council-City Clerk's Office; transition from Oracle to SQL, efforts to update A/V meeting capabilities, and upgrade to File Director 4.0 for the Library; implementation of new fingerprint system, electronic property evidence system, and internal affairs analytics for the Police Dept.; new CAD system for the Fire Dept.; completion of the 2024 audit plan, recognition for the Comprehensive Annual Financial Report, ERP project involvement, and upcoming annual external IT risk assessment in the Comptroller's Office; a new Milwaukee Buying Plan via the Purchasing Division; data on the reduction of record schedules, records management workshop attendance, and DocuSign use for Statements of Economic Interest forms from City Records Center; and vulnerability assessments, Wisconsin Cyber Task Force membership, migration of legacy platforms, acquisition of a ERP product, resetting of employee passwords, and a new ITMD Policy and Administration Director for ITMD.

At the June 6, 2024 meeting, various updates were given. Updates included Fire Dept. joining the Milwaukee.gov domain for the RNC; Police Dept. migrating its fingerprint system to the cloud; City Treasurer migrating its iNovah cashing platform; Water Works preparing its security system for the RNC; City Records Center making a budget capital request for new records replacement and ERMS systems; City Attorney's Office migrating its case management system; ITMD conducting vulnerability and penetration tabletop exercises; Comptroller's Office ongoing involvement in the ERP project; Library activities in broadband distribution, security enterprise system, public/private usage systems, and vulnerability/penetration tests; and Common Council-City Clerk activities in RNC preparation, ERM system, and new Common Council and committee assignments.

At the September 5, 2024 meeting, updates were given. Updates included Water Works' version 6 billing system going live, the Library's ongoing broadband equity initiative, Municipal Court case management system replacement and efforts to make court services virtually accessible, ongoing transition from Munis Citizen Self-Service to Resident Access and EFT plan switch to Tyler Auto Pay for the City Treasurer, City Records Center's pending capital budget request and work on historical data for an e-vault/ERMS system, ITMD phishing campaign completion and trainings, audits (internal IT risk assessment audit and BakerTilly audit of the City's financial statements for 2023) for the Comptroller, and onboarding of BOZA into the Legistar system for the Common Council-City Clerk.

At the December 12, 2024 meeting, a brief update was given on cyber security training and outstanding employees who have not completed the training.

## **Information and Technology Management Division**

### **Cyber Governance Assessment**

At the March 7, 2024 meeting, the committee discussed fulfilling an audit recommendation to have an authority body review citywide compliance of IT policies. A solution could be

departments working with ITMD and reporting to the City Information Management Committee on an annual basis.

### **Generative Artificial Intelligence (AI) Policy**

At the March 7, 2024 meeting, the committee did not take action and held the policy for further review by the Library and City Attorney's Office. Further details of the policy presented at this meeting can be found within file number [231717](#).

At the June 6, 2024 meeting, the committee reviewed and discussed concerns and changes to make to the policy pertaining to various language and terms, vendor use of AI, ChatGPT, sensitive information, and ownership of information. The committee discussed wanting to make further revisions to the policy inclusive of making the policy board, reference other guidelines, and allow departments to develop their own guidelines. The policy would be reviewed further by the Library, City Attorney's Office, and then the committee a final time. Further details of the policy presented at this meeting can be found within file number [240203](#).

At the September 5, 2024 meeting, the committee discussed revisions that were made to the policy. Changes consisted of clerical corrections; language added to sections "Privacy", "Equity", and "Introducing Generative AI to Your Work Environment"; and removal of the paragraph regarding the Public Records Act. Concerns were raised by the Dept. of Employee Relations to make further clarifications on various aspects and to establish guidelines to go along with the policy. The committee discussed moving forward with the policy as a high level document with the expectation to develop AI guidelines and or other policies in the future in partnership with DER. The committee approved an amended policy to include additional grammatical corrections and language added to reference future guidelines. Further details of the policy presented at this meeting can be found within file number [240639](#).

### **IT Service Delivery Survey**

At the September 5, 2024 meeting, survey results were given regarding IT service delivery citywide. Results showed a score of 3.95 out of 5 for overall satisfaction of IT service delivery relating to daily work performance, 71% in favor of IT resources adequately supporting job functions, 60% in favor of receiving adequate training to utilize available technology, various recommendations to enhance job performance, and other input. Further details of the survey presented at this meeting can be found within file number [240639](#).

### **Microsoft Licensing**

At the September 5, 2024 meeting, the committee discussed options to renew the City's Microsoft Office 365 licenses, which were expiring at the end of the year. Current licensing was the G1 version. The goal was to obtain split-level licensing with F3 and G3 level licenses. F3 would be for field workers with limited storage. G3 would be a full Microsoft Office client package.

At the December 12, 2024, an update was given on the implementation of new licenses beginning January 2025 with a 60-day roll out period. Licenses would be a combination of G1, G3, and F3 level licenses wherever appropriate for end users.

## **Strategic Technology Plan**

At the June 6, 2024 meeting, vice-chair Henke gave an overview of the plan regarding five main goals, 60 project ideas, and focus point categories under each goal. The committee discussed making various revisions to the plan ranging from broadening the plan to including security training. Vice-chair Henke concurred to make those revisions as well as creating dedicated goals for data, reorganizing focus points under the goals, and adding grants that ITMD were pursuing. He would use the strategic plan as part of his reappointment hearing as Chief Information Officer. Further details of the plan presented at this meeting can be found within file number [240203](#).

At the September 5, 2024 meeting, the committee approved a revised plan. The revised plan was modified since the last meeting. Notable changes pertained to addition of a project to review and refine the Data Governance Plan, completion of an IT survey, addition of IT project management and tools as a new initiative, and reorganization of various initiatives. Further details of the plan presented at this meeting can be found within file number [240639](#).

## **Supply Chain Risk Management Policy**

At the March 7, 2024 meeting, the committee reviewed the Supply Chain Risk Management Policy a final time and approved the policy. Further details of the policy presented at this meeting can be found within file number [231717](#).

## **Workday Implementation**

At the December 12, 2024 meeting, the committee was informed about a delay, due to staffing challenges, to the HR time entry and keeping portion of the implementation to Fall 2026 or a delay in the entire HR portion to the beginning of 2026. The delay would allow time for staff to make the system successful and result in using more contingency funds. The executive committee would make a determination by the end of 2024. Increased costs would be either \$1.5 million for a partial HR delay or \$2.5 million for a full HR delay impacting the 2026 budget.

**Documents and materials relating to record retention schedules, policies, presentations, audits, or other information for all meetings of the committee for 2024 can be found within the following files at <https://milwaukee.legistar.com/Legislation.aspx>:**

[231717](#) - Communication relating to the matters to be considered by the City Information Management Committee at its March 7, 2024 meeting.

[240203](#) - Communication relating to the matters to be considered by the City Information Management Committee at its June 6, 2024 meeting.

[240639](#) - Communication relating to the matters to be considered by the City Information Management Committee at its September 5, 2024 meeting.

[241228](#) - Communication relating to the matters to be considered by the City Information Management Committee at its December 12, 2024 meeting.