State of Montana
Montana Historical Society

Agency IT 2016
Fiscal Year 2016-2021

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1. Executive Summary

The Montana Historical Society is a public service-oriented entity providing access to historical collections and information of Montana's past. Information technology is crucial for providing such service and meeting the goals and initiatives outlined in the Agency plan. Given the Society's intense involvement with affiliated Montana museums, historical societies, historical preservation partners, libraries, and archive programs, our opportunities for continued, successful collaboration in IT applications are excellent.

To accomplish the requirements of the Historical Society's mission to provide exceptional customer service and for improving the preservation of Montana's history, we have developed an information technology plan to:

Heighten IT security and employee awareness;

Continue training for staff;

Secure funding for specialized software;

Provide enhanced electronic services and digital content availability;

Provide an improved and secure web experience to the public;

Continue with e-commerce for secure online transactions.

The agency plan is intended to follow closely with the direction of the State of Montana Information Technology Strategic Plan. All aspects of the Society's IT Plan are also intended to recognize the needs of the Society's user base and public customer. MHS works with SITSD and Montana Interactive to process business transactions using e-commerce. The museum store, membership, subscriptions and requests for Society research assistance through e-commerce are a few examples. MHS also anticipates subsequent applications for purchase of photographs and art transparencies, paying for reproductions of library materials, or any other fee for service that the Society offers. The Society has obtained legislative bonding authority of 7.5 million dollars towards the new Montana Heritage Center and the remodel of the Veteran and Pioneer Memorial Building, MHS is enthusiastic about the future prospect of improved facilities and a more state-of-the-art IT infrastructure

INTRODUCTION

Purpose

The Montana Historical Society (MHS) is the guardian of our state's memory. We identify, preserve, and make available the tangible remains of the past for the public. Because we are uniquely positioned to provide essential services, the MHS has been a fundamental component of the state's historical and cultural resources from the time it began operations in 1865.

Established by an act of the Territorial Legislative Assembly on February 2, 1865, the MHS has always had a broad range of responsibilities. It is our challenge to secure the physical and intellectual resources to keep pace with the changes occurring in Montana and in state government. Meeting this challenge will mean change for MHS. We will move ahead, confront these issues, provide leadership, and manage for change.

While recognizing with gratitude the contributions and direction of all those who served the Montana Historical Society so well during its first 150 years of existence, the strategic plan confronts the new issues, opportunities, and problems that the MHS currently faces.

Changing technology, increasing pressures for more collection, exhibition and public space, public demand for quality historical and cultural tourism opportunities, growing interest in research and publications dealing with the state's rich heritage, and new methods for taking MHS programs and services into every community in Montana are among the many issues facing the MHS. Our unique perspective gives us an opportunity to see beyond our functional mission to a greater goal of service to the people of Montana.

This strategic plan is a result of a series of reviews and updates. This document is meant to guide the organization through our work for the next five years, with annual reviews and updates.

ORGANIZATIONAL MISSION

The Montana Historical Society promotes an understanding and appreciation of Montana's cultural heritage—past, present and future.

To fulfill this mission the Montana Historical Society: collects, preserves, and provides access to historical resources held in trust by the MHS; produces educational and engaging exhibits, public programs, and publications; protects and preserves historic sites and cultural resources; and provides leadership to those with similar goals.

VISION

The Montana Historical Society is viewed as the acknowledged leader in preserving, interpreting, and protecting Montana's past. In collecting, maintaining and promoting Montana's heritage and historical resources, we strive to provide the highest quality of programs, services, and experiences, with integrity and professionalism, which engage people of all ages throughout Montana and beyond. We are recognized as a model for community engagement with Montana's history and a beacon for Montana's future.

CORE BELIEFS

- Montana's history is a valuable, irreplaceable, cultural resource worthy of preservation and study.
- Learning about and understanding Montana history is a continuous life-long experience and is a form of civic engagement.
- History, art, and culture help all people to understand who they are and from where they came. Interpretation of Montana's history is critical in the decision-making that creates our future.
- Teaching Montana history in our schools in an engaging way encourages a life-long interest in Montana's past and future.
- The Montana story should be responsibly told, focusing on the long and diversified (and unfolding) history of our state and region, and interpreted in a national/global context.
- Preservation, appreciation and investment in our history and culture help to promote Montana, and enriches Montana's economy by adding value to products and services.
- A strong sense of community is garnered by sharing generational experiences.

CRITICAL ISSUES

1. Marketing and development (institutional)

Increase visibility and reputation by expanding and improving directed marketing activities and public relations to promote the MHS and its services to a broad audience, encouraging support of MHS.

2. Security and preservation of art, artifacts and archives

Preserve resources and disseminate knowledge by extending and improving ways that heritage resources are acquired, maintained, and presented for both long-term preservation and use by the public.

3. Digital Strategies

Broaden engagement and expand learning by building upon core educational programs and services, while exploring new delivery systems and collaborations for expanding opportunities to educate the public about Montana's heritage.

a) Examine future plans for publications-digital publication, application R & D
b) Further define responsibilities and consider future staffing needs for social media effort
c) Redesign Montana Historical Society web site within state template
d) Explore ethics, protocols and goals of e-mail marketing
e) Develop a strategy for the Ed Craney Studio, video and podcasting

f) Establish goals and develop a plan for sustainability of the Newspaper Digitization Project
g) Integrate f online customer service functions
h) Continue to upgrade business systems, including digital storage
i) Upgrade SHPO State Antiquities Database

4. Legislative and Capital Campaign strategy

Continue to plan for remodeling of our existing building and the construction of a new facility to benefit the Capitol Campus and meet programmatic needs; and establish fundraising plans to accomplish this.

5. Long-term strategic and operational planning

Staff and Board of the Montana Historical Society share a common vision and work together as a cohesive organization, using individual expertise and established procedures for accomplishing sustainability of MHS.

a) Address changing staffing needs and skills for changing technology and priorities; provide training and learning opportunities
b) Study succession planning-identify key positions and high growth potential individuals
c) Reconsider space and design issues for Montana Heritage Center, including exhibit design
d) Seek strategic partnerships, i.e. universities, agencies, non-profits
e) Collaborate on MHS, territorial, suffrage, and Russell anniversaries.

3. IT Contributions and Strategies

MHS responses will encompass the IT needs to meet the strategic plan and critical issues as they pertains to IT. Changing technology, increasing pressures for more collection, exhibition and public space, public demand for quality historical and cultural tourism opportunities, growing interest in research and publications dealing with the state's rich heritage, and new methods for taking MHS programs and services into every community in Montana are among the many issues facing the MHS. Our unique perspective gives us an opportunity to see beyond our functional mission to a greater goal of service to the people of Montana.

Security and preservation of art, artifacts and archives: enhancing the security technology to provide security and monitoring of MHS art and artifacts with passive devices. Investigate the possibly that Security camera system that would reside on a server, thereby providing multiply users the ability to monitor a variety of galleries and visitors.

Digital Strategies:

A major challenge and an opportunity confronting museums today is that the museum experience is typically limited to on-site visitors. As museums increasingly develop online content, it is important to highlight two distinct goals: (1) introduce a wider audience to the museum and archival collections, and (2) build a deeper connection with those who have visited the museum. The possibly of Virtual Gallery Walk-Throughs, Videos of Gallery Talks, and Slideshows that preview upcoming exhibitions will enhance exposure to the work and the collections of MHS.

To provide content that would be interesting and engaging to the museum's members and visitors, especially to the members who cannot visit the museum's physical space.

The value of creating engaging digital content for museums goes beyond the goal of expanding the audience. It can be seen as a useful tool to expand the lifetime of an exhibition long after the physical exhibition is over. A well-crafted digital strategy also solves the conundrum of displaying a larger percentage of a museum's collection, which in the case of large museums can rarely be exhibited in its entirety. Dealing with these challenges effectively will provide significant opportunities to museums and other cultural institutions.

The plan for the future is investigating and developing the type of digital strategies that MHS could implement over the next few years.

4. Principles

IT principles govern the decisions and operations of the state's IT community. They provide touchpoints and guidelines to ensure that correct decisions are being made; decisions that will provide the greatest value to Montana's citizens. The majority of Montana's IT principles have their roots in Montana's Information Technology Act (MITA).
Montana's IT principles:

- Resources and funding will be allocated to the IT projects that contribute the greatest net value and benefit to Montana stakeholders.

- Unwarranted duplication will be minimized by sharing data, IT infrastructure, systems, applications and IT services.

- Montana will use shared inter-state systems to minimize IT expenditures, improve service delivery and accelerate service implementation.

- IT will be used to provide educational opportunities, create quality jobs, a favorable business climate, improve government, protect individual privacy and protect the privacy of IT information.
- IT resources will be used in an organized, deliberative and cost-effective manner.
- IT systems will provide delivery channels that allow citizens to determine when, where, and how they interact with state agencies.
- Mitigation of risks is a priority for protecting individual privacy and the privacy of IT systems information.

5. IT Governance

The Montana Historical Society has established in 1865, technology has changed over the last 151 years.
The Board of Directors is appointed by the Governor. The Board of Trustees appoints the Director. The Director is fully responsible for the immediate direction, and management of the Society.   IT decisions are ultimately made by the Director. Senior Managers and the MHS's IT Administrator provide input. Once an IT decision is made staff are notified by the following mechanisms: Program Meetings, Email, All-staff meetings. If the policy is a requirement, staff signs the policy.

 MHS and the state CIO will work in a cooperative manner to strengthen these governance structures so they provide the framework for a deliberative approach to making IT investments that support the services the state provides to its citizens.

6. IT Financial Management

MHS's IT budget is included in HB2. The Centralized Services Division of MHS manages the budget for the Agency. Monthly budget meeting are held to track progress through the month.

7. IT Services and Processes

MHS uses a variety of services provided by ITSD.
   Email

Asset Broker
Enterprise Services
 Network Services
Application Hosting
FileNet
Oracle
Geospatial Web Services
Additionally, MHS utilizes Montana Interactive for Agency enterprise businesses and donations. MHS uses PastPerfect software for management of the museum's art and artifacts, and uses a Point of Sale system for the museum store.

- Montana Shared Catalog – a library collection management system. The vendor is SirsiDynix, the software is Workflows and the online presence is called Enterprise. This is administered by the Montana State Library and we pay an annual membership fee for the services.
- ContentDM / Montana Memory Project – a digital content management system. The vendor is OCLC and the software is OCLC. The software is hosted by OCLC and we share the cost for the software, hosting and storage with the Montana State Library.
- OCLC Digital Archives – a long-term preservation storage solution for digital content. The vendor is OCLC. We share the cost for a statewide subscription to the Digital Archives with the Montana State Library.
- Chronicling America – this is a digital content management system for the digital content created through the National Digital Newspaper Project, a federal project funded by the National Endowment for the Humanities and administered by the Library of Congress. We send our data to the Library of Congress, who uploads is to chroniclingamerica.loc.gov.
- XMetaL / Northwest Digital Archives – NWDA provides online, searchable access to the finding aids for our archival collections. We use XMetaL to encode the finding aids with XML. They are uploaded to and hosted by the NWDA, a program of the Orbis Cascade Alliance. We pay an annual membership fee for services.

8. IT Infrastructure, Staffing and Resources

MHS employs one IT professional. When the legislature approves the remodel and expansion of MHS building, MHS will have the need for additional IT staff.

9. Risks and Issues

Primary Risk	Probability	Impact	Mitigation Strategy
Staff retirements	Low	High	MHS currently has one IT professional with possible retirement in the next 10 years. The agency will develop a succession planning program . Positions/skills rated as critical will have individual plans for skills transfer, replacement, documented procedures, etc. for mitigating the impact.

Security breach	Medium	High	Our agency participated in the Securing The Human security program. During MHS staff meetings staff training and awareness, data encryption, and security policies are reviewed. Yearly review of the State IT Policy with staff signing off on the policy
Aging Infrastructure	High	Medium	A significant proportion of desktop computers are well past the recommended five year replacement period. MHS will seek funds for a focused replacement program and will pursue arrangements with other agencies' hardware retirement programs to reduce the overall age of our systems.

10. IT Goals and Objectives

Goal Number 1:

ITG 1   INTEGRATED AGENCY IT PLATFORM

Describe the business requirements or business problem driving this objective.

This ongoing goal integrates the current IT Platform with MHS programs and service needs to create centralized, efficient, and appropriate deployment of information technology solutions within the scope of the MHS strategic plan as well as personnel and financial resources.

Describe the benefits to be derived from the successful completion of this objective.

MHS staff benefit by having the resources needed to perform without overextending limited personnel and financial resources. MHS partners and patrons benefit by having reliable access to high quality content and services. Montana taxpayers benefit through tax savings associated with appropriate use of IT in government.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

Inability to conduct adequate business functions in a cohesive and organized manner between Society programs, other state agencies, and the public.

What is the timeframe for completion of this objective? Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

Developed IT resources will be organized, deliberative and cost effective; Improved government services; Ability to provide educational opportunities.

Supporting Objective/Action

ITO 1-1   Proactive management of hardware and software assets.

Describe the business requirements or business problem driving this objective.

Proactive management of hardware and software assets is essential to assure continuity of services provided to MHS employees, patrons and partners.

Describe the benefits to be derived from the successful completion of this objective.

Proactive management of hardware and software assets ensures that MHS staff has a stable desktop computing environment as well as a stable, secure data center. MHS partners and patrons benefit by having reliable access to high quality content and services provided through stable information systems. Montana taxpayers benefit through tax savings associated with appropriate management of hardware and software assets.

 Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not

completing this objective; risks associated with completing this objective).

Reduced financial resources means that MHS might not have the financial resources necessary to keep up with replacement cycles, maintenance plans, or warranties. Some patron services may be compromised if systems warranties lapse. Staff time shifts from productive work to nursing of aging systems.

What is the timeframe for completion of this objective? Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?
- MHS staff maintain current documentation on all systems and applications;
- MHS staff maintain and review back-up routines monthly;
- MHS staff develop, maintain and test fail-over systems for critical information systems;
- MHS ensures that all business critical hardware and software assets are protected by maintenance plans and warranties;
- MHS replaces hardware on a five-year cycle and software as needed and as budget allows;
- MHS maintains software license compliance across all MHS platforms.

Supporting Objective/Action

ITO1-2   IT Security

Describe the business requirements or business problem driving this objective.

Develop IT resources in an organized, deliberative and cost effective manner; protect individual privacy and the privacy of information contained within IT systems; provide educational opportunities.

Describe the benefits to be derived from the successful completion of this objective.

Creates a secured IT environment for all database and confidential information; will heighten employee and volunteer awareness of IT security, policies and procedures which will create a more secure computing environment within the Society and statewide.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

A more vulnerable work environment with increased susceptibility to a breach of confidential information.

What is the timeframe for completion of this objective? Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

Implementation of a Society-wide security program through new employee orientation and continued distribution of literature, both electronic and printed form, as it relates to IT security policies and procedures.

Supporting Objective/Action

ITO1-4   Staff training

Describe the business requirements or business problem driving this objective.

MHS must increase efficiencies through creative opportunities for collaboration and cross-training among internal colleagues as well as with MHS partners. ITSD training will improve government services and provide educational opportunities for staff.

Describe the benefits to be derived from the successful completion of this objective

Established training schedule to allow employees to receive adequate training for IT programs and software, as well as other training needs within the Society. MHS benefits from backup support for critical functions and from efficiencies gained utilizing ITSD staff. MHS patrons benefit by having reliable access to MHS programs and services that is not impacted by insufficient IT support.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

With today's increase in technology requirements, risk of the inability to process information timely and accurately is high. Failed customer service is certain. Current organizational funding model inhibits training for staff.

What is the timeframe for completion of this objective? Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

1) IT staff complete a minimum of one training course and/or attend at least one professional conference that supports MHS programs and services annually;
2) Staff report a benefit from increased opportunities for collaboration among IT personnel;
3) Staff and patrons report benefit from improved responsiveness to IT service requests.

Goal Number 2:

ITG 2   **ELECTRONIC SERVICES AND DIGITAL CONTENT ACCESS AVAILABILITY**

Describe the business requirements or business problem driving this objective.

Improve customer service and staff efficiency by making Society services and information available electronically, enhancing both onsite visitor education and research experiences and opportunities and distance experiences and opportunities.

Describe the benefits to be derived from the successful completion of this objective.

Greatly improved accessibility to agency archives, artifacts, and publications.

Beneficiaries: External education organizations, researchers and the general public.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

Inability to provide internal and external access to collections and related information digitally, as well as a decrease in customer services.

What is the timeframe for completion of this objective? Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

Create quality jobs and a favorable business climate; develop IT resources in an organized, deliberative and cost effective manner; improved government services; provide educational opportunities

Supporting Objective/Action

ITO 2-1   Access to Research Center and Museum Catalogs

Describe the business requirements or business problem driving this objective.
Accurate and complete inventory of collections, for internal control as well as public access.

Describe the benefits to be derived from the successful completion of this objective.
Increased and improved public access to collections, improved internal collection management.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).
Inability to properly manage collections and decreased or no public access to collections.

What is the timeframe for completion of this objective?
This is an ongoing project; as new collections are received they must be added to the catalogs.   Minimally, will add all newly received collections to the catalog within 6 months of receipt. Backlog items to be completely added within the next 7 years, as funding allows.

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?
All backlog items are searchable within the catalog and newly acquired items are added within 3 months of receipt.

Supporting Objective/Action

ITO 2-2   Antiquities Database

Describe the business requirements or business problem driving this objective.

The State Historic Preservation Office (SHPO) is tasked with maintaining a statewide inventory of heritage properties per MCA **22-3-423**.

Describe the benefits to be derived from the successful completion of this objective.

The Antiquities Database is used by SHPO to make determinations for state and federal agencies on any effects to heritage properties located in the State.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

Without the antiquities database SHPO would be severely limited in response to state and federal agencies when being consulted on the National Historic Preservation Act, The Montana State Antiquities Act, and The Montana Environmental Policy Act.

What is the timeframe for completion of this objective?   Ongoing

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

This is an ongoing project that will be continually updated. This database allows us greater protection of preservation resources with continued maintenance and improvements.

Supporting Objective/Action

ITO 2-3   E-Commerce

Describe the business requirements or business problem driving this objective.

Supports/Implements State IT Goal: Improve government services.

Describe the benefits to be derived from the successful completion of this objective.

Secured server/e-commerce applications for relevant Society transactions; greater efficiency; improved service to customers, and increased productivity; allows broader access to collections, merchandise, archives and related information.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

Decrease in customer service.

What is the timeframe for completion of this objective?   FY 2014

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

 Enhanced on-line capabilities

Supporting Objective/Action

ITO 2-4   Electronic Access to Montana Magazine of Western History

Describe the business requirements or business problem driving this objective.

Publishing is now in the digital age, and the technology exists to allow much wider circulation of printed material, especially among outside core audiences. Completion of the project would increase sales of the printed version of the magazine as well as MHS Press books because these products will have increased presence among readers.

Describe the benefits to be derived from the successful completion of this objective.

Having the entire sixty-year run of Montana The Magazine of Western History freely available as text-searchable PDF would increase accessibility and make it available to a world-wide audience. These goals lie at the heart of the Montana Historical Society's mission as a public agency. Search ability across publications and time periods allows users to find exactly the information they are looking for and to quickly access it.

Describe the anticipated risks associated with this objective. (e.g., risks associated with inaction or not completing this objective; risks associated with completing this objective).

This project should be undertaken as funding allows. Although completion of the project would increase sales of the printed version of the magazine, since digital accessibility increases visibility, there are no particular risks involved in regard to the project's timeframe.

What is the timeframe for completion of this objective?

The project would be started as soon as funding is available. It would take six months to a year to scan hard copies and format them for on-line posting.

Describe the critical success factors associated with this objective; i.e., how will you know when it has been successfully completed?

The magazine's print run would be available for public use and search functions would work flawlessly. MHS website and other library databases would be updated to direct patrons to the magazine PDFs.

IT Projects

No planned Projects

12. Security and Business Continuity Programs

The Montana Historical Society has implemented a department-wide (agency) information security management program compliant with §2-15-114, MCA and State Information Technology Systems Division *Information Security Programs* policy with adoption of the National Institute of Standards and Technology (NIST) Special Publication 800 series as guides for establishing appropriate security procedures. This is in alignment with the State of Information Technology Service's direction for an enterprise approach to protect sensitive and critical information being housed and shared on State and/or external/commercial information assets or systems.

As described in NIST SP 800-39, the agency has developed and adopted the Information Risk Management Strategy to guide the agency through information security lifecycle architecture with application of risk management. This structure provides a programmatic approach to reducing the level of risk to an acceptable level, while ensuring legal and regulatory mandates are met in accordance with MCA §2-15-114.

The agency's program has four components, which interact with each other in a continuous improvement cycle. They are as follows:

Risk Frame – Establishes the context for making risk-based decisions

Risk Assessment – Addresses how the agency will assess risk within the context of the risk frame; identifying threats, harm, impact, vulnerabilities and likelihood of occurrence

Risk Response – Addresses how the agency responds to risk once the level of risk is determined based on the results of the risk assessment; e.g., avoid, mitigate, accept risk, share or transfer

Risk Monitoring – Addresses how the agency monitors risk over time; "Are we achieving desired outcomes?"

The agency's information security management program is challenged with limited resources; manpower and funding. While alternatives are reviewed and mitigation efforts are implemented the level of acceptable risk is constantly challenged by the ever changing technology and associated risks from growing attacks and social structure changes. Specific vulnerabilities have been identified which require restructure, new equipment, or personnel positions (funds increase).

Continuity of Operations (COOP) Capability Program Description: The Montana Historical Society IT mission is dedicated to providing the highest quality of support and service to society staff, volunteers and customers by managing and using IT resources effectively and developing IT resources in an organized deliberative and cost effective manner. During 2015 MHS worked with ITSD to enhance the Agency Information Security programMHS partnered with Legislative Services Division. Additionally, MHS established the documented information security program with the assistances of James Ashmore with ITSD.

Public Records – Agency Records Management: All electronic records will be retained and disposed of in accordance with general records retention schedules, agency records retention schedules, and/or federal retention requirements.

13. Planned IT Expenditures

Expense Category	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Personal Services	94,869	99,612	104,593	109,822	115,313	121,079
Operating Expenses	260,976	274,025	287,726	302,112	317,218	333,079
Initiatives	50,000	0	0	0	0	0
Other	12,000	20,000	20,000	20,000	20,000	20,000

expenditures						
Totals	417,845	393,637	412,319	431,934	452,531	474,158

14. Administrative Information

Description: *This part provides SITSD with contact information if there are any questions. Fill in the appropriate names and information.*

Role: Plan Owner
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