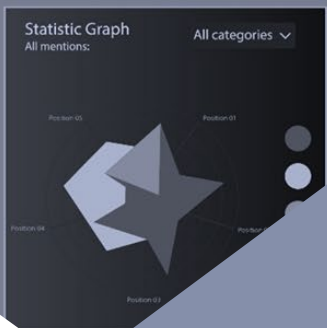
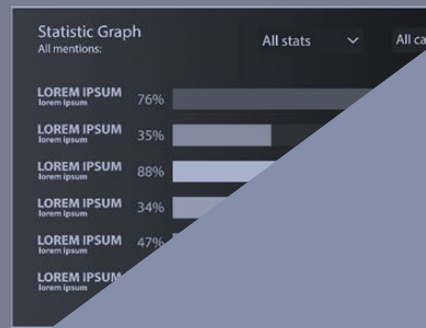


Statistic Graph  
All mentions: All stats All categories

#	PRODUCT NAME	QTY	PRICE	TOTAL
1	ITEM 01	21	9.99\$	209.79\$
2	ITEM 02	4	5.5\$	22\$
3	ITEM 03	5	20\$	100\$
4	ITEM 04	12	40\$	480\$



Dec. 16  
2021

# QUARTERLY REPORT

INFORMATION  
TECHNOLOGY  
BOARD

## MEETING OVERVIEW



Thursday, December 16, 2021



10:00 a.m. – 12:00 p.m.



[September 16, 2021 Meeting Recording](#)



Members

### Misty Ann Giles – Chair

Brian Gootkin

Chris Dorrington

Representative Braxton Mitchell

Beth McLaughlin

Michael Harris

Susan Fox

Arthur Pembroke, Montana Association of Counties

Sean Higgenbotham, Cascade County

Ryan Osmundson

Vacant

Laef Olson

Adam Meier

Jennifer Fielder

Christi Jacobsen

JP Pomnichowski

Troy Downing

Kevin Gilbertson

### Administration

Corrections

Environmental Quality

House District 3

Judicial Branch

Justice/Attorney General Office

Legislative Services

Local Government

Local Government

Office of Budget and Program Planning

Office of Public Instruction

Private Sector

Public Health and Human Services

Public Service Commission

Secretary of State

Senate

State Auditor

State IT Services Division

## September 16, 2021 Minutes

### Members Present

Misty Ann Giles, DOA- Chair	Brian Gootkin, COR	Christi Jacobsen, SOS	Molly Plummer, SAD
Kevin Gilbertson, State CIO	Michael Harris, DOJ	Braxton Mitchell, House Rep	Dale Gow, LEG
Jennifer Fielder, PSC	Sean Higginbotham, LGOV Rep	Laef Olson, Private Sector Rep	Lisa Mader, JUD

### Guests

Amy Sassano, GOV	Errolyn Lantz, GOB	Kim Warren, DLI	Rian Miller, SITSD
Andy Hanks, SITSD	Fred Sargeson, Tyler Tech	Lance Wetzel, SITSD	Samantha Mongoven, NIC
Annie Murdock, SITSD	Jason Pekovitch, NIC	Manuel Soto, DOR	Thomas Judge, DPH
Audrey Hinman, SITSD	Jessica Plunkett, FWP	Maryann Costello, SITSD	Tim Walker, Treinen Asso
Bradley Runnion, SITSD	John McCarthy, DPH	Mike Bousliman, MDT	Tom Mander, Peraton
Christie Magill, SITSD	Kari Hahn, SITSD	Pat Boles, MS	Veronica Lamka, Peraton
Christie Breland, DOR	Kellee English, SOS	Rawlin Richardson, SITSD	

### Welcome

- [\(00:00:04\)](#) Recording Announcement, CIO Support Staff
- (00:00:57) Chair Remarks, Misty Ann Giles
  - (00:01:02) Introductions and Welcome New Members
  - (00:05:41) Misty Ann Giles made a motion to approve the December 17, 2020 minutes. Motion carried.
- [\(00:03:05\) State Chief Information Officer \(CIO\) Report, Kevin Gilbertson](#)
  - (00:03:43) Introductions and Welcome New Members
  - (00:06:39) Information Technology Managers Council (ITMC)
  - (00:09:50) ARPA Contact Center

### Business

#### Standing Reports

- [\(00:11:08\) Project Dashboard Report, Kevin Gilbertson](#)
- (00:14:41) Chief Information Security Officer (CISO) Report, Andy Hanks
  - (00:15:06) Security updates
  - (00:18:56) Montana Information Security Advisory Council (MT-ISAC) Report
- (00:21:04) Chief Financial Officer (CFO) Report, April Grady
  - (00:21:12) HB 10
  - (00:21:44) Fiscal Year End
- (00:22:24) Acting Chief Technology Officer (CTO) Report, Audrey Hinman
  - (00:22:41) Technology updates
  - (00:23:29) Montana Interactive Update
  - (00:23:58) Okta
  - (00:25:12) PayZang
- (00:25:58) Chief Customer Success Officer Report, Rian Miller
  - (00:26:09) Customer Success Office Overview

### Discussion

- (00:27:17) Member Forum/Suggestions, None Reported
- (00:27:40) Public Comment, None Reported
- (00:28:01) Future Agenda Topics
  - SITSD Strategy Conference Discussion

### Adjournment (00:28:59)

Next Meeting  
 September 16, 2021  
 10:00 a.m. to 12:00 p.m.  
 TBA

## AGENDA

### Welcome

- Recording Announcement, CIO Support Staff
  - Introductions
- Chair Remarks, Misty Ann Giles
  - Review and Approve [September 16, 2021 Minutes](#)
- Chief Information Officer Report, Kevin Gilbertson

### Business

- Meeting Effectiveness/Improvements, Kevin Gilbertson
- Operational Overview, Kevin Gilbertson
  - Enterprise IT Financial Workgroup (EITFW) Overview
  - MT-ISAC Report
  - Program Increment Planning
  - State of Montana IT Rate Structures
  - Executive Summary Overview

### Discussion

- Member Forum/Suggestions
- Public Comment
- Future Priorities

### Adjournment

- Next Meeting
  - Thursday, March 17, 2022
  - 10:00 a.m. – 12:00 p.m.
  - Location TBD

## MEETING EFFECTIVENESS/IMPROVEMENTS

### [2.17.513, MCA. Duties of the Board](#)

#### Why you Matter to ITB

As senior policy officials, your participation, guidance, and influence will ensure information technology resources are utilized in an organized, deliberative, and cost-effective manner to the benefit of our citizens.

#### Summary of Key Roles and Responsibilities

- Drafts legislation recommendations to the Governor
- Advises enterprise purchases regarding IT resources
- Drives implementation of emerging technology in state government
- Reviews major budget requests, and rates
- Advises on eGovernment services
- Reviews and approves major IT projects
- Advises department on statewide IT standards and policies
- Assists in drafting the State Strategic Information Technology Plan

## OPERATIONAL OVERVIEW

Detailed Discussions/Topics

- [Information Technology Board Operating Procedures](#)
- [Enterprise IT Financial Workgroup \(EITFW\) Overview](#)
- [MT-ISAC Report](#)
- [WSJF](#)
- [Program Increment \(PI Planning\)](#)
- [State of Montana IT Rate Structures](#)
- [Executive Summary Overview](#)

## OPERATING PROCEDURES

### Roles and Responsibilities ([2-17-505, MCA](#) and [2-17-513, MCA](#))

Information technology is an essential component in enabling the Governor's initiatives and must serve citizens in a secure, efficient, and effective manner. The board shall guide state and local government in the development and deployment of intergovernmental information technology resources.

The board provides a collaborative forum to draft legislation recommendations for the Governor and Legislature regarding information technology statute's, policies, and other legislation. These proposed changes will ensure the efficiency and effectiveness of information technology at an enterprise level for state and local government.

It is essential the board study the past, present, and future information technology needs to guarantee emerging technology aids in the development of enterprise information technology purchases. An essential role of the board is to advise the Department of Administration (DOA) on statewide information technology standards, policies, major information technology budget requests, and rates.

The board is the central coordination point to identify, evaluate, and prioritize departmental and interagency electronic government services. This level of effort will ensure the appropriate creation, management, and administration of electronic government services and information.

### Membership ([2-15-1021, MCA](#))

Board members are appointed by the Governor in January of every odd-numbered year. Appointees to the Board shall be senior policy officials such as department directors, legislators, and agency Chief Information Officers (CIOs.) Members of the Board and their designated alternates should be senior managers, not technical staff.

### The Board will consist of 18 members:

- Director of DOA, who serves as the Chair
- State CIO
- Director of the Office of Budget and Program Planning (OBPP)
- Three (3) members who are directors of state agencies, appointed by the governor
- Two (2) Local Government Representatives, appointed by the governor
- One (1) member representing the public service commission, appointed by the public service commission
- One (1) Private Sector Representative, appointed by the governor
- One (1) member of the House of Representatives, appointed by the Speaker of the House
- One (1) member of the Senate, appointed by the President of the Senate
- One (1) Legislative Branch Representative, appointed by the Legislative Branch Information Technology Planning Council
- One (1) Judicial Branch Representative, appointed by the Chief Justice of the Supreme Court
- One (1) K-12 Education Representative, appointed by the Superintendent of Public Instruction
- The Attorney General or their designee
- The Secretary of State or their designee
- The State Auditor or their designee

Appointments must be made without regard to political affiliation and exclusively for the management of the information technology resources used by the state.

A vacancy occurring on the Board must be filled by the appointing authority in the same manner as the original appointment.

In the event of delayed reappointment, current appointees will continue in their positions until reappointments occur.

## OPERATING PROCEDURES (CONT.)

### Voting and Participation

Members are strongly encouraged to attend all meetings. An alternate may be designated to represent members on the occasion that they are unable to attend. The designated alternate may vote on behalf of the member.

The Board shall function in an advisory capacity ([2-15-1021, MCA](#) and [2-15-102, MCA](#)). A majority of the membership of the Board constitutes a quorum to do business ([2-15-122, MCA](#)). Each member of the Board has one vote.

### Meetings

The Board shall meet on a quarterly basis or as determined by the Chair. The Chair may call a special meeting of the Board.

### The State Information Technology Services Division (SITSD) Participation

SITSD may provide technical resources for assigned subcommittees, as requested by the Chair.

### The State CIO Support Staff will provide the following administrative support to the Board:

- Assisting in creation of meeting agenda
- Organizing meeting dates
- Coordinating meeting rooms
- Facilitating meetings
- Drafting minutes
- Distributing correspondence
- Responding to the ad-hoc needs of the Board
- Assuring approval of the Operating Procedures after appointment of the Board in each odd-numbered year.

### Communications

The Board shall communicate through the Chair. Members are encouraged to contact the Chair with suggested agenda items. Official correspondence will be distributed at the discretion of the Chair.

All Board meeting materials will be distributed via the ITB website:

<https://sitsd.mt.gov/Governance/Boards-Councils/IT-Board/>.

### Operating Procedures

The Operating Procedures will be reviewed and approved in the first meeting of the newly appointed members after January of each odd-numbered year.

### Expense Reimbursement

Mileage, meals, and lodging expenses will be reimbursed according to Section's [2-15-124, MCA](#) and [5-2-302, MCA](#).

Approved on:

Motion:



## ENTERPRISE IT FINANCE WORKGROUP (EITFW) OVERVIEW

The Enterprise IT Financial Workgroup (EITFW) was established as a standing workgroup of the Information Technology Manager's Council (ITMC) to make recommendations regarding the financial impact of existing and proposed enterprise-based IT solutions for the State of Montana.

Mission Statement: EITFW is a multi-agency advisory forum that will provide input on decisions impacting IT service offerings; including rate setting, utilization, and cost recovery.

Goal 1: Review and advise on IT services and their corresponding rates based on need, projected utilization, and estimate of full costs to provide service.

Goal 2: Review and advise on policies and procedures for the cost recovery of centralized IT services provided by SITSD.

Goal 3: Review and advise on guidelines for consistent recording of IT expenses using the IT account codes established in MOM Policy 316.

Goal 4: Collaborate with OBPP to maintain a framework for reporting statewide IT expenditures in Volume 10 of the Governor's Executive Budget.

Goal 5: Provides a forum for collaboration between SITSD and agencies to improve billing efficiency and transparency.

EITFW meets monthly and, after the dissolution of ITMC, will report to ITB quarterly.

The current business items include:

- Reporting of agency merchant fees on agency PayZang reports
- Agency implementation of Amplifund grants management software
- IT Financial Management strategic planning
- Budgeting and rate-setting process for the 2025 biennium
- Vendor demonstrations from DocuSign and/or Adobe Sign as an enterprise solution
- WAN billing by user or device
- Establish a transaction fund planning committee

Standing reports include:

- The state ESRI contract and allocations
- Updates on Billing Platform, the new ITSD billing system
- IT grant funding sources, research, and management

EITFW is also responsible for providing input on new services introduced to the enterprise and how the costs for those services will be allocated to the agencies. EITFW was integral in the cost allocation for the ServiceNow implementation.

Future meetings will focus on evaluating rate structure alternatives and implementing components of the IT Financial Management strategic plan. Short-term items to address include enterprise desktop purchasing, IT asset management, and IT investment portfolio management. Long-term goals include an innovation and research and development funding mechanism to prioritize and fund new technologies across the enterprise.

# MONTANA INFORMATION SECURITY ADVISORY COUNCIL (MT-ISAC) REPORT

The Montana Information Security Advisory Council (MT-ISAC) was established in 2015. The council serves at the pleasure of the Governor and consists of fifteen to twenty Council members, representing the various State and Federal agencies, local governments, universities, K-12 schools and private entities. The Governor appoints the Council members and the Chair. The purpose of the Council is to advise the Governor with respect to a statewide strategic information security program.

Website: <https://sitsd.mt.gov/Governance/Boards-Councils/MTISAC/>

- The last meeting was December 15, 2021
- The next meeting is March 16, 2022

## Last meeting agenda

- NGA Policy Academy for Cybersecurity Workforce Development
- Enterprise Risk Assessment
- Security Strategic Plan
- CSET: Ransomware Readiness Assessment
- Montana Cybersecurity Enhancement Project
- Infrastructure Security Bill
- Microsoft Windows Print Spooler Vulnerabilities

## Workgroup updates

- **MT-ISAC Best Practices Workgroup**
  - Launched 2021-22 Nationwide Cyber Security Review (NCSR)
  - Reviewed Statewide Virtual Tabletop results
  - Secure Coding Guideline approved
  - SANS Vouchers distributed
- **MT-ISAC Girls in Cybersecurity Workgroup**
  - Launched Kids Safe Online Poster Contest for K-12 schools
  - Launched CyberStart America for K-12 schools and Cyber FastTrack for colleges
  - Planning Security Awareness video initiative for K-12 schools
- **MT-ISAC Strategic Partnerships Workgroup**
  - Apply consistent security policies across the state
  - Socialize cybersecurity best practices
  - Establish cybersecurity conference
- **MT-ISAC Montana CAREs Workgroup**
  - Multi-agency workgroup to serve public institutions in Montana
  - Planning for Communication, Assessment, Response, and Enhancement services

## WSJF

Weighted Shortest Job First (WSJF) scoring model is a prioritization framework developed by Scaled Agile to help product management teams prioritize jobs like epics, capabilities, and features.

Feature	Business Analysis, Technical Analysis, Backlog, In	Product Manager	Product Owner	User/Business Value	Time Criticality	Risk Reduction/Opportunity Enablement	Cost of Delay	Job Size	WSJF
Implement Hardware Asset Management in ServiceNow	In Progress	April Grady	April Grady	13	8	8	29	5	5.80
Implement Windows Hello	In Progress	Dave Johnson	Tanner Schwartz	20	13	13	46	8	5.75
Implement SCCM CMG (System Center Configuration Manager Cloud Management Gateway)	In Progress	Dave Johnson	Tanner Schwartz	8	13	20	41	8	5.13
Complete an Enterprise Risk Assessment	In Progress	Andy Hanks	Rich Vimpany	13	13	13	39	8	4.88
Moving to Microsoft (MS) MFA Solution	In Progress	Jerry Marks	Ben Howard	13	13	13	39	8	4.88
Implement Infoblox Phase 2	In Progress	Ashley Downir	Chris Hope	13	5	3	21	5	4.20
Complete a POC for SD WAN	In Progress	Ashley Downir	Chris Hope	13	5	13	31	8	3.88
Configure ServiceNow CSM (Customer Service Management) module	In Progress	Rawlin Richard	Annie Kilgour	20	20	8	48	13	3.69
Complete Proof of Concept for Disaster Recovery to Amazon Web Services (AWS)	In Progress	Oliver Hudgins	Chad Kroll	13	20	13	46	13	3.54
Implement ITBM in ServiceNow with PPM Tools	In Progress	April Grady	Rian Miller	8	1	8	17	5	3.40
Refresh PCs for SITSD	In Progress	Dave Johnson	Tanner Schwartz	1	1	8	10	3	3.33
Migration from ePass to Okta for Single Sign On (SSO)	In Progress	Jerry Marks, Au	Ben Howard	5	5	5	15	5	3.00
CMDB	In Progress	Dave Johnson	Dave Johnson	20	5	13	38	13	2.92
Complete Web Application Firewall Audit	In Progress	Andy Hanks	Rich Vimpany	8	8	20	36	13	2.77
Replace Call Center Technology	In Progress	Rian Miller	Casey Collins	20	13	20	53	20	2.65
Modernize Mobile Device Management by investigating cloud capabilities with Workspace One and In Tune	In Progress	Jerry Marks	Randy Haefka	5	8	8	21	8	2.63
Migrating to TEAMS Voice	In Progress	Ashley Downir	Casey Collins	8	13	13	34	20	1.70

# SITSD Program Increment (PI) Planning

A Program Increment (PI) is a timebox during which an Agile Release Train (ART) delivers incremental value in the form of working, tested software and systems. PIs are typically 8-12 weeks long. The most common pattern for a PI is four development Iterations, followed by one Innovation and Planning (IP) Iteration.



## STATE OF MONTANA IT RATES AND STRUCTURES

### Enterprise Services Allocation (ESA)

Enterprise Services Allocation 22/23	
Adlib Maintenance	\$ 19,197.23
Adobe ETLA	\$ 347,149.73
Application Development	\$1,399,272.00
Application Hosting .NET Ongoing Support	\$ 59,370.10
Application Hosting .NET Server Environment	\$ 9,749.48
Application Hosting App Server Ongoing Support	\$ 7,138.82
Communications Cloud	\$ 130,000.00
Continuity of Government	\$ 567,600.00
Database Hosting - SQL	\$ 8,158.08
Database Hosting - SQL Licensing	\$ 2,353.98
DBA Professional Services	\$ 31,410.00
Directory Services - Active Directory	\$ 171,859.31
Directory Services - Google	\$ 14,309.35
DNS DHCP IPAM	\$ 55,930.37
Enterprise Infrastructure / ESA	\$ 226,427.48
Enterprise Website/Web Content Hosting	\$ 346,859.82
Expert Time - AHS	\$ 58,381.20
Expert Time - CIO	\$ 305,932.48
Expert Time - Contract and Vendor Management	\$ 350,914.31
Expert Time - CTO	\$ 84,640.22
Expert Time - Executive Services & Support	\$ 201,895.93
Expert Time - Service Desk	\$ 50,669.15
Expert Time - ServiceNow	\$ 328,714.21
Expert Time - Supervision ATSB	\$ 75,804.25
Expert Time - Supervision ESB	\$ 29,577.78
Expert Time - Supervision ETSB	\$ 64,587.81
Montana.gov and MINE	\$ 286,640.21
MS Support Contract	\$ 538,125.00
<b>ESA Total</b>	<b>\$5,772,668.31</b>



## STATE OF MONTANA IT RATES AND STRUCTURES (CONT.)

### Cybersecurity Enterprise Services Allocation (CESA)

<b>CESA 2023B</b>	
<b>Service</b>	<b>Requested Amount</b>
Application Development	\$ 24,000
Cybersecurity Enterprise Services - ESP	\$ 702,415
Cybersecurity Enterprise Services - IRTS	\$ 1,292,132
Directory Services - Identity Management	\$ 168,587
eGov Identity Management	\$ 57,378
Expert Time - AHS	\$ 336,000
Expert Time – Enterprise Security Risk Man	\$ 518,625
Expert Time – Forensic Investigations or T	\$ 618,638
Expert Time - NOSC	\$ 939,136
Expert Time - Supervision CISO	\$ 444,053
File and Object Storage	\$ 18,778
Live Storage	\$ 95,189
MFA Service	\$ 934,424
Network Security	\$ 791,042
Software Configuration Management	\$ 95,314
Splunk Service	\$ 818,482
Virtual Server	\$ 301,446
	<b>\$ 8,155,640</b>

## STATE OF MONTANA IT RATES AND STRUCTURES (CONT.)

### SITSD Rates

#### Rate Setting:

The Legislature approves SITSD rates charged to other state agencies for services and appropriates the cost of the service in the purchasing agencies' budgets.

#### Rate Calculation:

SITSD offers more than 100 services. Service costs are recouped through agency payment of approved rates. SITSD, as an internal service fund, is subject to maintaining a 30-day working capital.

#### Rates=

- **Personal Services (PS) + Operational Expenses (OE) + Overhead (OH) / Total Units Sold**

#### Rate/Working Capital

Cost of Service/Agency Utilization = Rate

- Working capital is the amount of cash remaining if all the current assets were converted to cash at their book value and all the current liabilities were paid at their book value.
- 30-day working capital prohibits SITSD from over-collecting and accumulating an excess fund balance.
- If agencies opt not to use SITSD services for which they were appropriated, SITSD must reduce expenditures to offset loss.

## SITSD RATE CALCULATION CHANGE

### Current Rate Calculation:

- Personal Services (PS) + Operational Expenses (OE) + Overhead (OH) / Total Units Sold
- *Overhead is spread out across all services that have personal service costs.*

### Change in Rate Calculation:

- Personal Services (PS) + Operational Expenses (OE) / Total Units Sold
- *Removing overhead from the rates and adding the category as a subcategory in the Enterprise Service Allocation.*

### How will this affect SITSD?

- Removing overhead from the service rates will allow SITSD to be transparent on the direct costs for each service.

### How will this affect agency budgets?

- The agencies would see a decrease in their rated services and an increase in their fixed cost item for the Enterprise Services Allocation.



## FINANCE EXECUTIVE SUMMARY

SITSD Business Services has worked with agencies to implement a new IT Billing System. SITSD gathered input from agencies on the features, integrations, and functions for a new system that would aid in simplifying and clarifying the billing process. The new system is in production and invoices have been processed through October 2021. SITSD continues to work with agencies on any issues that arise as well as working with SITSD ATSB staff to add requested functionality. The SITSD ITAM group has transferred all SITSD hardware asset data into ServiceNow and is fully using the system for IT hardware asset management. SITSD is now working with agencies to implement Hardware Asset Management in ServiceNow.

SITSD is working with State Accounting Bureau to evaluate merchant fee percentages related to eGovernment services and to provide successful engagements with the vendor.

SITSD Business Services is working with State Procurement Bureau to develop a vendor management initiative that will create a vendor inventory, implement a vendor classification tool, create a vendor scoring process, and implement a risk profile and assessment tool. The

Enterprise Services and Support Bureau is creating a grants management program and has been working with the technology and security bureaus to develop projects suitable for grant funding. ESSB will work with OBPP on cybersecurity opportunities available through infrastructure funding and will also involve agencies in grant projects when appropriate.

SITSD is in the beginning stages of creating a standardized training office. Providing a training officer will improve performance, create greater confidence, provide career opportunities, establish in-house training, decrease inequities, ensure skill-based training, etc. This program will include employee orientation and would also guide the emerging leader initiative. This position has been posted and SITSD will soon be engaging in the hiring process. Along with the training program SITSD is working to partner with other state agencies, private entities, schools and universities to establish an internship program to grow an IT workforce from within the state of Montana's communities. SITSD has engaged with Carroll College and is in the planning stages of an internship program for the spring 2022 semester.

SITSD is currently working with EITFW on developing a state-wide IT investment strategy that will improve efficiencies throughout the enterprise. This is a standing agenda item for EITFW to aid the state in defining and establishing common enterprise IT values and priorities. This strategy will allow for priority-based budgeting throughout state IT, implement cost-sharing opportunities, and provide funding for innovation and R&D.

## TECHNOLOGY EXECUTIVE SUMMARY

### ServiceNow

- The State of Montana hosted a multi-state, multi-agency art of the possible workshop on AppEngine, ServiceNow's low code/no code platform. Thank you to everyone who attended the workshop with SN. It was successful and beneficial for all those who attended. The state is working on licensing options for agencies use of AppEngine.
- The State is working with ServiceNow on a Customer Service Management (CSM) module 90-day success roadmap (training, governance, and adoption) for the CSM deployment. Our goal is to have it out by the end of October or beginning of November. Also, ServiceNow will be providing a demo/workshop to SITSD and agencies to better understand how CSM can Help Information Technology Service Management (ITSM) enable faster deploy time and configuration to agencies.

### Microsoft Teams Voice

- SITSD is adding teams voice as an additional phone option alongside the current VoIP system for customers.
- Final design phase will cover long distance handling and phone number transition support.

### Microsoft Multi-Factor Authentication (MFA)

- We have started the transition from RSA MFA to Microsoft MFA. We will move 1,000 to 1,500 users that have expiring tokens soon. We'd rather transition them, so we don't have to buy new tokens. We are going to transition in phases by users and not whole agencies.
- We are working with Microsoft to secure funding to provide resources to help with the transition.
- RSA MFA currently cost the State of Montana \$615,000 per year, Microsoft MFA licensing and soft tokens are included in the State's Microsoft agreement. Hard tokens as needed will still need to be paid for by the State.

### Okta

- The State is moving from the legacy public single sign on product, ePass Montana, to Okta, a new SaaS product.
- Okta professional services will provide assistance with the configuration for the account conversion between the systems.
- SITSD project managers swill start reaching out to agencies get a schedule worked out as we get closer to conversion go live.

### Move to Exchange Online

- All State employees have a license for exchange online included in the Microsoft agreement.
- Completing the project will decrease on prem hardware and maintenance needs.
- The State will end of life on prem Exchange on October 15, 2021. Any mailboxes that have not been moved by October 15, 2021 will be migrated at that time.

## SECURITY EXECUTIVE SUMMARY

### Accomplishments and Priorities

- Hired Security Architect and Offensive Security Specialist
- Three staff earned certifications in cloud security
- Created more orchestration and automation playbooks
- Registering information systems in RSA Archer
- Launched the Enterprise Risk Assessment

### Annual Security Awareness Training

- The 2021-22 Annual Security Awareness Training cycle launched on October 1, 2021 and will end on May 31, 2022
- Current training cycle completion rate by branch: Executive: 52%, Legislative: 40% and Judicial: 66%
- 93% of enrolled State employees completed the 2020-21 Annual Security Awareness Training

### NGA Policy Academy

- One of five states selected by the National Governor's Association
- Montana is focusing on Cybersecurity Workforce Development
- Partnership with Employers, Schools, and State Government
- Have had multiple CORE and HOME team meetings
- Held a workshop with NGA
- Scheduling workgroup meetings

### 2019 HB2 Status Overview

- Allocated \$6.3m
  - Spent \$5,609,528
  - Carry forward 148,222
  - Unused \$542,250
    - Planned \$337,007.50
- 12 projects divided into 20 initiatives
  - Closed = 17
  - Executing = 3
- CMDB project closed September 2021, final payment of approximately \$27,896.50 pending
- GRC project 95% completed, targeting March 31, 2022 for completion, \$24,500 remaining.
- Enterprise Risk Assessment project, 10% completed, targeting June 30, 2022 for completion, \$215,952 remaining.
  - ERA Critical Risk Mitigation, 0% completed, to be started after ERA completes, to be completed December 2022, \$68,659 remaining.

### 2021 HB10 Status Overview

- Allocated \$500k
  - Unused \$500k
- 1 project (CASB)
  - Not Started = 1

## CUSTOMER SUCCESS EXECUTIVE SUMMARY

### ARPA Contact Center

The contact center continues to take calls and cases from citizens. Statistics from the program (went live on June 1):

- Nearly 25,000 visits to ARPA.mt.gov, with over 57,000 pageviews
- 10,000+ FAQ views
- Over 4,200 cases opened (email and phone)
- Highest viewed pages (other than home): Economic, Health, Housing

We continue to work with agency ARPA Programs to find additional ways to support our agency partners and help citizens navigate the benefits available to them.

### Customer Success

Customer Success Managers continue to work with agencies to support them in meeting goals, objectives, and priorities. We collaborate in a monthly tactical meeting that covers any immediate issues, concerns, blockers, and updates. Quarterly Business Reviews have also begun, in which we discuss strategic plans and goals, IT budgets, agency health scorecard, and projects.

Gainsight, our customer success tool, is helping the team to manage the immense amount of information needed to help our agency partners and customers be successful in achieving goals and objectives. We track many pieces of information and data for our agency partners, such as contacts and information, enterprise project involvement, training opportunities, sentiment, budget allocated and spent, meeting cadences, meeting notes, follow-up tasks and more. We will eventually be able to connect to other databases to increase the data we can use to support agencies. We also plan to use this system to help us send surveys for improvement, satisfaction, and engagement.

### Program Increment Planning

SITSD held its first Program Increment (PI) Planning on October 18 & 19. This two-day planning session gave SITSD the ability to view all our current projects/efforts on one board, while reviewing all the dependencies we have on our own internal teams. PI Planning is an essential element of practicing SAFe (Scaled Agile Framework), which SITSD is adopting as a best practice moving forward.

Our next PI Planning is scheduled for January 19 & 20. It will be open to SITSD staff and agency CIOs as well, to include any agency effort or projects (that may or may not have dependency on SITSD).

### CSAT Metrics

SITSD has maintained a score of 4.7 or higher every month since we began tracking. It remains at a 4.7 out of 5 today.

The ARPA CSAT score has experienced some swing to the score. We have made several internal changes based on comments received from citizens answering the surveys. Since making changes, we have experienced score improvements from month to month. Currently it's at a 3.3 out of 5.

## LEGISLATIVE FINANCE COMMITTEE Q1 CIO REPORT

### Exceptions Granted to State Agencies (2-17-515, MCA)

- State CIO, Kevin Gilbertson sent:
  - DNRC Director, Amanda Kaster, an approval on July 22, 2021 to the MOM-SITSD-POL-Information Technology Procurement Request (ITPR) Policy- Section 111, B., and Appendix A Section C.
  - DNRC Director, Amanda Kaster, a denial on September 28, 2021 to the MOM-SITSD-POL-Information Security Policy/MOM-SITSD-STD-Enterprise DNS Standard.
  - DOR Director, Brendan Beatty, an approval on October 6, 2021 to the MOM-SITSD-POL-Information Technology Life Cycle (ITLC) Policy.

### Information Technology Projects (2-17-512, MCA and 2-17-526, MCA)

- The information technology project portfolio report, supplemental reports, and post implementation reports are located at <https://fcreports.mt.gov>.

### Policy Changes (5-12-205, MCA)

- None to report

### Information Technology Procurement Requests (ITPR)

- Total Number of ITPRs – 267
- Denied ITPRs – 0
- Total Costs – \$49,555,677.30
- Annual Ongoing Cost – \$17,377,639.22
- ITPRs with \$0.00 Cost – 36

### Agency Procurement Report

- Total number of IT items purchased – 374
- Total cost - \$709,006.99
- Agencies – COR, FWP, TRS
- Items Include - Desktop PCs, Approved Software, non-networked prints, PC accessories, UPS, etc.

## LEGISLATIVE FINANCE COMMITTEE

### Q1 PROJECT PORTFOLIO SUMMARY

Agencies reported 40 projects.

The project dashboard is located here: <https://lfcreports.mt.gov>.

**2 Black Overall Health Status** (This status is defined as a project that has been funded but does not have a charter or security plan in place)

- DLI - WSD CASES Integrated Case Management System
- HHS - MFSIS Phase 2

**2 Yellow Overall Health Status** (Supplemental Reports Located in Dashboard)

- DEQ - Coal Information Management System (CIMS): Phase 1
- LIV - Livestock Interface Systems Upgrade Project

**5 Red Overall Health Status** (Supplemental Reports Located in Dashboard)

- HHS - MPATH – Provider Services
- HHS - MPATH – Care Management Module
- MDT - Program & Project Management System (PPMS)Post
- SOS - ElectMT
- STF - Insurance Policy and Billing System Replacement

**8 Total Closing Projects**

- HHS – CAPS Mainframe to MidTier Transition
- HHS - CHIMES COVID-19 Policy and Procedure Change
- HHS - CHIMES IVR-Phone Workload Relief & Fraud, Waste, and Abuse Alerting
- HHS - Prevention, Detection and Monitoring of Medicaid Fraud, Waste and Abuse
- HHS - Process, Automation, and Efficiency Enhancements
- HHS – SEARCHS Mainframe to MidTier Transition
- HHS - WellSky VocRehab
- LEG – House/Senate Chamber Automation Project

**4 Closed Projects** (Post-Implementation Reports Located in Dashboard)

- DOJ - Criminal Justice Information Network (CJIN) System Replacement
- DOJ - Montana Criminal History Improvement Project – Computerized Criminal History Version 3
- MDT - Advanced Linear Transportation Information System (ALTIS)
- STF - Enterprise Data Catalog and Unstructured Extraction Framework