MONTANA
SITSD

March 24
2022

QUARTERLY
REPORT

INFORMATION
TECHNOLOGY
BOARD

MEETING OVERVIEW

📅 Thursday, March 24, 2022

⏱ 10:00 a.m. – 12:00 p.m.

📄 [December 16, 2021 Meeting Recording](#)

👥 Members

Misty Ann Giles – Chair	**Administration**
Brian Gootkin	Corrections
Chris Dorrington	Environmental Quality
Representative Braxton Mitchell	House District 3
Beth McLaughlin	Judicial Branch
Michael Harris	Justice/Attorney General Office
Susan Fox	Legislative Services
Arthur Pembroke, Montana Association of Counties	Local Government
Sean Higgenbotham, Cascade County	Local Government
Ryan Osmundson	Office of Budget and Program Planning
Vacant	Office of Public Instruction
Laef Olson	Private Sector
Adam Meier	Public Health and Human Services
Jennifer Fielder	Public Service Commission
Christi Jacobsen	Secretary of State
JP Pomnichowski	Senate
Troy Downing	State Auditor
Kevin Gilbertson	State IT Services Division

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December 16, 2021 Minutes

Members Present

Kevin Gilbertson, Acting Chair-St CIO
Jennifer Fielder, PSC
Amy Sassano, GOV
Michelle Hauer, DEQ

Brian Gootkin, COR
Sean Higginbotham, LGOV Rep
Molly Plummer, SAO
Dale Gow, LEG

Authur Pembroke, MAC
Laef Olson, Private Sector Rep
Kellee English, SOS
Lisa Mader, JUD

JP Pomnichowski, SEN
Carrie Albro, DPH

Guests

Andy Hanks, SITSD
Annie Murdock, SITSD
April Grady, SITSD
Ashley Downing, SITSD
Audrey Hinman, SITSD
Bradley Runnion, SITSD
Christie Breland, DOR

Christie Magill, SITSD
Denise Adamson, SITSD
Erik Wilkerson, PSC
Errolyn Lantz, GOV
Fred Sargeson, NIC
Hunter McClure, SEG
Jerry Marks, SITSD

Jessica Plunkett, FWP
Kellee English, SOS
Manuel Soto, DOR
Matt Van Syckle, SITSD
Michael Sweeney, SAO
Michele Snowberger, SITSD
Oliver Hudgins, SITSD

Rennan Rieke, MHS
Rian Miller, SITSD
Rich Vimpany, DOA
Samantha Mongoven, NIC

Welcome

(00:00:04) Recording Announcement, CIO Support Staff
- (00:00:49) Introductions

(00:03:51) Chair Remarks, Kevin Gilbertson, Acting chair
- (00:05:02) Molly Plummer made a motion to approve the September 16, 2021 Minutes. Laef Olson seconded. Motion Carried.

(00:05:20) Chief Information Officer Report, Kevin Gilbertson

Business

(00:06:37) Meeting Effectiveness/Improvements, Kevin Gilbertson

(00:08:53) Operational Overview, Kevin Gilbertson

(00:09:14) Enterprise IT Financial Workgroup (EITFW) Overview, April Grady

(00:13:56) MT-ISAC Report, Andy Hanks

(00:22:56) Program Increment Planning, Kevin Gilbertson

(00:31:32) State of Montana IT Rate Structures, April Grady
- (00:00:00) Motion was made by Commissioner Fielder to establish a "Rates Working Group". Carrie Albro Seconded that motion. Motion carried.

(01:22:58) Executive Summary Overview
- (01:23:33) Technology, Matt Van Syckle
- (01:41:04) Security, Andy Hanks
- (01:46:23) Customer Success, No Questions

Discussion

(01:46:40) Member Forum/Suggestions, None

(01:47:12) Kevin Gilbertson called for a motion to approve "ITB Operating Procedures". Molly Plummer made motion. Carrie Albro seconded the motion. Motion carried.

(01:57:57) Public Comment, None

(01:55:11) Future Priorities
- Rate Work Group
- Vote on State Strategy
- Updates on Cyber Security Infrastructure bill

Adjournment

(01:56:26) Commissioner Fielder motioned to adjourn the meeting. Meeting adjourned.

AGENDA

Welcome

- Recording Announcement, CIO Support Staff
    - Introductions
- Chair Remarks, Misty Ann Giles
    - Review and Approve December 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
    - Rates Workgroup Overview
    - MT-ISAC Report
    - Program Increment Planning
    - Executive Summary Overview

Discussion

- Member Forum/Suggestions
- Public Comment
- Future Priorities

Adjournment

- Next Meeting
    - Thursday, June 23, 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

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OPERATIONAL OVERVIEW

Detailed Discussions/Topics

- [Enterprise IT Financial Workgroup (EITFW) Overview](#)

- [MT-ISAC Report](#)

- [Program Increment (PI Planning)](#)

- [Executive Summary Overview](#)

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 will report to ITB quarterly.

The current business items include:
• Updates from the newly formed Innovation Committee on how to spend the transaction fund and other funding mechanisms for modernization across the enterprise
• Budgeting and rate-setting process for the 2025 biennium
• Centralized desktop purchasing
• Grant management software updates
• Microsoft true-up

Standing reports include:
• The state ESRI contract and allocations
• Updates on Billing Platform, the 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.

Future meetings will focus on 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 IT modernization 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 March 16, 2022
- The next meeting is June 1, 2022

Last meeting agenda
- NGA Policy Academy for Cybersecurity Workforce Development
- Enterprise Risk Assessment
- Security Strategic Plan
- Montana Cybersecurity Enhancement Project
- State and Local Cybersecurity Grant Program (IIJA)
- Cybersecurity Planning Committee
- Log4j Updates
- Cybersecurity Measures to Protect Against Critical Threats

Workgroup updates
- **MT-ISAC Best Practices Workgroup**
- Launched 2021-22 Nationwide Cyber Security Review (NCSR)
- Scheduled next Statewide Virtual Tabletop results
- **MT-ISAC Girls in Cybersecurity Workgroup**
- Completed Kids Safe Online Poster Contest for K-12 schools
- Continued 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

Current Action Items
- Submit Council Member nominations to Governor for appointment
- Update and approve Operating Papers
- Appoint workgroup chairs

MONTANA SITSD

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.

FINANCE EXECUTIVE SUMMARY

The SITSD ITAM group is currently engaging with an implementer to implement software
asset management in ServiceNow. Once implementation is completed in SITSD, SITSD will offer SAM to
agencies.

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 has contracted with a grant writer and has been working
with the technology and security bureaus to develop projects suitable for grant funding. SITSD is
planning to submit proposals for an apprenticeship program and cybersecurity workforce development
training this spring. ESSB will work with OBPP on cybersecurity opportunities available through
infrastructure funding and will also involve agencies in grant projects when appropriate.

ESSB is also standardizing a communications plan within SITSD to ensure customers and end-users are
receiving all pertinent information in a clear and concise format. Communications has been identified as
a dependency on numerous projects so SITSD is posting Communications Coordinator position that will
take on communication planning and development. This role will also implement an OCM methodology
to optimize business processes for end-users by creating the communications plan, implementing the
plan, helping draft template communications for agency rollout, and enhancing adoption efforts through
training.

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 filled and Andrea
Gordon has already created a fun learning environment on Teams, issued a survey to staff regarding
training needs, orchestrated two leadership trainings to managers and staff, and created an onboarding
handbook and improved process. The training office will also be developing a social strategy to make
SITSD a sought-after place to work.

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 started internships with two students from Carroll College for the
spring 2022 semester and hope to expand the program to more students and additional Montana
schools..

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 modernization and R&D.

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TECHNOLOGY EXECUTIVE SUMMARY

ServiceNow CSM
- SITSD is working on a roles document to outline the different roles needed to support CSM both in STSD and in the agencies.
- Early May is the goal to get everyone moved over to CSM.

Okta
- End of life for ePass Montana is June 30th.
- Extension of this deadline will require an exception and the agency will need to pay for the cost of the environment.
- The egov transaction fund is currently paying the costs for ePass.
- File transfer service is transitioning from ePass to Okta in March.

SD-WAN POC
- SITSD is working with multiple agencies to test SD-WAN at 5 locations in the State
- SD-WAN will enable multiple connections per site enabling better costs, redundancy and monitoring of WAN sites.

Cloud disaster recovery
- SITSD completed two cloud DR POCs during the last year as options to replace Miles City for storage and compute DR
- VCDR on Amazon AWS has been selected as the future hosting environment for DR
- SITSD plans to transition 20% of storage and compute DR to AWS by the end of 2022 and complete the transition by the end of 2023.

Microsoft MFA
- The State is pausing the move to Microsoft MFA, due to technical limitations that would negatively impact IT and business operations.
- SITSD will continue to order RSA tokens this year and is encouraging agencies to use soft tokens when the new tokens are ordered.

SECURITY EXECUTIVE SUMMARY

Accomplishments and Priorities
- Hired a cybersecurity analyst and an information system security officer
- Managed two major nation-state threats to State information systems
- Coordinated responses to multiple state and county cyber incidents
- Registered information systems in GRC tool
- Communicated Windows 10 End of Life to State agencies
- Submitted updated information security policy for review
- Started planning for IIJA State & Local Cybersecurity Grant program
- Started planning for centralizing Executive Branch cybersecurity
- Coordinated all State agencies to complete the Nationwide Cyber Security Review (NCSR)

Annual Security Awareness Training
- The 2021-22 cycle begins October 1, 2021 and ends on May 31, 2022
- 72% of State employees completed so far (Executive: 76%, Legislative: 60% and Judicial: 81%)
- 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
•Scheduling workgroup meetings to start in March and end in April
•Final report due by June 30

2019 HB2 Status Overview
•Allocated $6.3m (Spent $5,609,528, Accrued $389,616, Remaining $187,548)
•12 projects divided into 20 initiatives (3 executing, 17 closed)
•CMDB & SecOps, 65% completed, targeting December 31, 2022 for completion, $94,676 accrued, $92,893 expended, $1,784 remaining.
•Enterprise Risk Assessment, 25% completed, targeting June 30, 2022 for completion, $269,940 accrued, $107,926 expended, $162,014 remaining.
•RSA Archer, 95% completed, targeting March 31, 2022 for completion, $25,000 accrued, $1,250 expended, $23,750 remaining.

2021 HB10 Status Overview
•Allocated $500k (Spent $0)
•1 project (1 initiating)
•Cloud Access Security Broker (CASB), 1% completed, targeting December 31, 2022 for completion, $500k budgeted, $0 expended, $500k remaining.

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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 33,000 visits to ARPA.mt.gov, with over 84,000 pageviews
- 13,000+ FAQ views
- Over 6,000 cases opened (email and phone)
- Highest viewed pages (other than home): Economic, Housing, Health

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.

Program Increment Planning
SITSD is in the final weeks of our second Program Increment (PI) Planning. The second two-day planning session (performed on a quarterly basis) gave SITSD the ability to learn from our first attempt at planning work in a different and more transparent way. Feedback received from agencies have been extremely positive and have confirmed this method allows more visibility into SITSD's planning process and the actual work we have in front of us for the next quarter. 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 April 6 & 7. It will be open to SITSD staff, agency CIOs and Agency IT staff 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 4.6 or higher every month since we began tracking. It remains at a 4.6 out of 5 today.

The ARPA CSAT score has experienced some swing to the score over the past 6 months. We have made several internal changes based on comments received from citizens answering the surveys. After making changes, we experienced score improvements from month to month for a period of time. However, the current score has not changed for the last two months, remaining at a 3.4 out of 5.

LEGISLATIVE FINANCE COMMITTEE
Q2 CIO REPORT

Exceptions Granted to State Agencies (2-17-515, MCA)
State CIO, Kevin Gilbertson sent:

- DOR Director, Brendan Beatty, an approval on October 6, 2021, to the MOM-SITSD-POL-Information Technology Life Cycle (ITLC) Policy.
- MDT Director, Malcom Long, a six-month approval on November 23, 2021, to the MOM-SITSD-POL-Online Electronic Payment Processing Policy.
- HHS Director, Adam Meier, a denial on November 23, 2021, to the MOM-SITSD-POL-Online Electronic Payment Processing Policy.
- DEQ Director, Chris Dorrington, a conditional approval on December 10, 2021, to the MOM-SITSD-POL-Information Technology Life Cycle (ITLC) Policy-Citizen And MOM-SITSD_POL-Information Security Policy -Appendix A (Baseline Security Controls).
- State Superintendent, Elsie Arntzen, an approval on December 15, 2021, to the MOM-SITSD-POL-Online Electronic Payment Processing Policy.
- DOA Director, Misty Ann Giles, a conditional approval on December 22, 2021, to the EO-O9-2016 Convergence Plan.

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://lfcreports.mt.gov.

Policy Changes (5-12-205, MCA)
None to report

Information Technology Procurement Requests (ITPR)
- Total Number of ITPRs – 226
- Denied ITPRs – 1
- Total Costs – $32,415,244.72
- Annual Ongoing Cost – $6,665,894.04
- ITPRs with $0.00 Cost – 25

Agency Procurement Report
- Total number of IT items purchased – 215
- Total cost - $762,042.48
- Agencies – COR, FWP, TRS, ART
- Items Include - Desktop PCs, Approved Software, non-networked prints, PC accessories, UPS, etc.

LEGISLATIVE FINANCE COMMITTEE
Q2 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)
- o   DEQ – Fees-Application-And-Compliance-Tracking-System (FACTS)
- o   HHS - MFSIS Phase 2

2 Yellow Overall Heath Status (Supplemental Reports Located in Dashboard)
- o   COR – Electronic Health Records System
- o   DEQ - Coal Information Management System (CIMS): Phase 1

3 Red Overall Health Status (Supplemental Reports Located in Dashboard)
- o   HHS - MPATH – Care Management Module
- o   MDT - Program & Project Management System (PPMS)Post
- o   STF - Insurance Policy and Billing System Replacement

4 Total Closing Projects
- •   DOR – Cannabis Control Division IT System
- •   HHS – MPATH – Provider Services
- •   LEG – House/Senate Chamber Automation Project
- •   STF - Insurance Policy and Billing System Replacement

7 Closed Projects (Post-Implementation Reports Located in Dashboard)
- •   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