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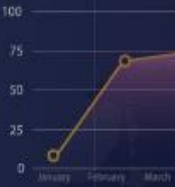
14.81 %

Statistic Graph
All mentions:



#	PRODUCT NAME	QTY	PRICE	TOTAL
1	ITEM 01	21	9.995	209.995
2	ITEM 02	4	5.55	22.2
3	ITEM 03	5	205	1025
4	ITEM 04	11	405	4455

Statistic Graph
All mentions:



Statistic Graph
All mentions:



Statistic Graph
All mentions:

02

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2015

2017

2019

2014

2016

2018

2020

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Statistic Graph
All mentions:



October 17

2024

QUARTERLY REPORT

INFORMATION
TECHNOLOGY
BOARD

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MEETING OVERVIEW



Thursday, July 25, 2024



1:00 p.m. – 3:00 p.m.



Members

Misty Ann Giles

John Daugherty

James Fehr

Braxton Mitchell

Beth McLaughlin

Austin Knudsen

Jerry Howe

Arthur Pembroke, Montana Association of Counties

Sean Higgenbotham, Cascade County

Ryan Osmundson

Elsie Arntzen

Laef Olson

Charlie Brereton

Jennifer Fielder

Christi Jacobsen

Daniel Zolnikov

Troy Downing

Kevin Gilbertson - Chair

Administration

Corrections

Environmental Quality

House Representative

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

July 25, 2024 Minutes

Members Present

Carrie Albro, HHS
Jennifer Fielder, PSC
Michael Sweeney, SAO

Kevin Gilbertson, SITSD Chair
Dale Gow, LEG

Laef Olson, Public Sector

Guests

Elle Arredondo, SITSD
Katy Brandis, SITSD
Jen Coen, SITSD
Ashley Downing, SITSD
Phillip English, PSC
Erin Fashoway, MSL
Chris Santucci, CISO
Katelyn Schaub, SITSD

Andrea Gordon, SITSD
Scotty Harry, Snowflake
Chris Hermance, SITSD
Chris Hunt, City of Whitefish
Kelsea Kimerly, SITSD
Tracy Kjorstad, PSC
Michele Snowberger, SITSD
Patricia Trooien, PSC

Errolyn Lantz, GOV
Samantha Mongoven, Tyler Montana
Matt Overstreet, Gartner
Jessica Plunkett, FWP
Rawlin Richardson, SITSD
Bradley Runnion, SITSD
Steve Troxel, SHI International Corp.
Matt Van Syckle, KWR

Welcome

- (00.00.04) Recording Announcement, CIO Support Staff
 - (00.00.46) Introductions
- (00.03.51) Chair Remarks, Kevin Gilbertson, Acting
 - (00.04.09) Jennifer Fielder made a motion to approve the March 4, 2024 [Minutes](#). Laef Olson seconded the motion. Motion carried.
- (00.05.07) Chief Information Officer Report, Kevin Gilbertson
 - (00.05.07) SITSD Reorganization

Business

- (00.12.08) Operational Overview, Kevin Gilbertson
- (00.23.37) Calculating IT Project Composite ROI

Discussion

- (00.47.08) Member Forum/Suggestions
- (00.47.22) Future Priorities
- (00.47.36) Public Comment

Adjournment (00.48.34)

- Next Meeting
 - September 19, 2024
 - 10:00 a.m. – 12:00 p.m.
 - Zoom Webinar

AGENDA

Welcome

- Recording Announcement, CIO Support Staff
 - Introductions
- Chair Remarks, Kevin Gilbertson
 - Review and Approve July 25, 2024 Meeting Minutes

Business

- Review and Approve Operating Procedures
- Operational Overview

Discussion

- Member Forum/Suggestions
- Future Priorities
- Public Comment

Adjournment

Next Meeting
Thursday, September 19, 2024
10:00 a.m. – 12:00 p.m.
Zoom Webinar

OPERATIONAL OVERVIEW

1. [Program Increment \(PI Planning\)](#)
2. [Enterprise IT Financial Workgroup](#)
3. [SITSD Executive Summaries](#)

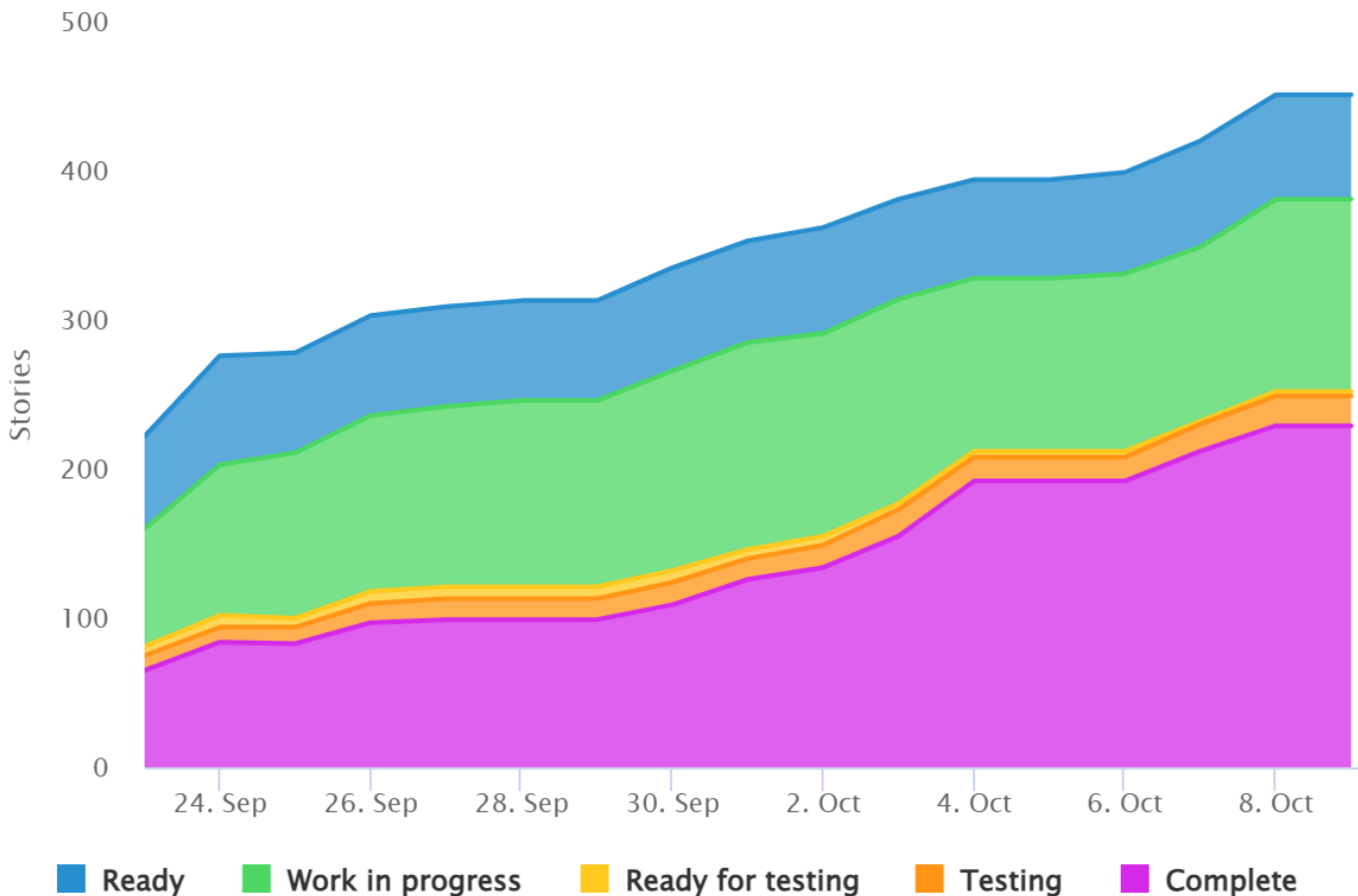
SITSD Program Increment (PI) Planning

Our Scaled Agile Program Coach, Denise Adamson, has completed training sessions for all SITSD leaders and scrum masters.

SITSD is working toward fully utilizing the SAFe module in ServiceNow for planning, tracking, and reporting the work we are completing. The goal is to have the whole division using the SAFe module in ServiceNow by the end of this program increment (PI). Using this module will provide a variety of advanced tracking and visualization tools to support our implementation of the SAFe Framework. The visualization below is from the first sprint of this PI and is one example of our data visualization capabilities.

Cumulative Flow Diagram - A cumulative flow diagram below is used to visualize the flow of work through the states and the overall progress. Work efforts are depicted on the vertical axis, while the horizontal axis shows the timeline. The different colored bands represent the current state of work items.

- Ready:** Indicates the number of work items (stories) that are ready to start work on.
- Work In Progress:** Indicates the number of work items that are currently being worked on.
- Ready for Testing:** Indicates the number of work items that are ready to be tested.
- Testing:** Indicates the number of work items currently being tested.
- Complete:** Indicates the number of work items that are complete.



Enterprise IT Financial Workgroup (EITFW) Overview

The Enterprise IT Financial Workgroup (EITFW) is a standing workgroup of the Information Technology Board 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.

SITSD finance has been working with Proven Optics on data gathering for the implementation of the Total Cost Model and Forecasting. The cost model will improve the visibility of understanding what goes into a rate and will help up to track total cost of ownership. The Budgeting and Forecasting model will begin during Phase 2 and that will improve forecasting, financial reporting, and ROI. This system will replace Techbudget during our next budgeting cycle.

SITSD is working with the budget office through the 2027B budget that was requested. We have reduced our budget submission by \$3.6M and will continue to work with agencies and internally in SITSD to determine if there are any contracts that can be reduced in cost or terminated. Most increases are coming from SITSDs vendors on software contracts that have been increasing around 10%. We will continue to communicate any changes that happen during our conversations with the budget office.

SITSD is continuing to grow the Enterprise IT Asset Management Community of Practice. Several learning opportunities and community sessions have been held. Topics that have been discussed are:

- ITAM best practices
- Maturing your ITAM program
- The future of AI in the ITAM industry
- Roles and responsibilities
- ServiceNow Tool HAM demonstration
- Mobile device ServiceNow tool demonstration

Future events:

- SAM Service Now Tool demonstration facilitated by our ServiceNow partners.

SITSD Executive Summaries

1. [Technology Executive Summary](#)
2. [Security Executive Summary](#)
3. [Operations Executive Summary](#)
4. [Innovation and Transformation Executive Summary](#)
5. [Digital Infrastructure Executive Overview](#)

TECHNOLOGY EXECUTIVE SUMMARY

The Technology Office at SITSD focuses on development and application hosting services for the enterprise. This quarter, the team has prioritized five key initiatives to enhance the organization's technological landscape. These projects aim to reduce technical debt, improve digital accessibility and usability, strengthen security measures, and streamline SITSD's internal operations.

Initiative – Strategic Planning

The Technology group is developing a Balanced Scorecard to guide its strategic direction over the next two years. This tool will align key objectives and initiatives with both the State IT Strategic Plan and SITSD Strategic Plan, ensuring cohesive and purposeful progress. The scorecard will prioritize critical areas such as enhancing digital accessibility and user experience, standardizing service delivery and expectations, and optimizing the software and product development lifecycle. By focusing on these strategic objectives, the Technology group aims to drive innovation, improve efficiency, and deliver superior value to stakeholders across the enterprise.

Initiative – 508 Compliance Evaluations

The United States Department of Justice recently issued a landmark rule under Title II of the Americans with Disabilities Act (ADA) mandating the accessibility of web content and mobile applications for individuals with disabilities. This final rule explicitly defines the responsibilities of state and local governments to ensure their digital platforms are accessible. In accordance with this directive, all State of Montana websites and applications must achieve Web Content Accessibility Guidelines (WCAG) Level AA compliance by April 24, 2026. In response, the Technology group has prioritized a comprehensive evaluation of all existing applications and websites. The team is developing a strategic roadmap to not only bring these digital assets into compliance but also to implement sustainable practices that will maintain accessibility standards moving forward.

Initiative – Reduction of Technical Debt

The Technology group is prioritizing the reduction of technical debt across all platforms and applications, while simultaneously developing a long-term strategy for ongoing debt management. This initiative is multifaceted, addressing immediate concerns while laying the groundwork for sustainable practices. Currently, the team is focused on three critical areas: conducting end-of-life server upgrades for applicable applications, migrating data from obsolete storage hardware to new infrastructure, and collaborating with Gartner to establish a process for assessing and prioritizing technical debt across the entire application portfolio.

Initiative – Digitization of Business Processes

The Technology group is actively expanding its collaborative efforts with state agencies to identify opportunities for digitizing business processes through the ServiceNow platform. This strategic initiative leverages the platform's robust capabilities to streamline operations and enhance efficiency across various departments. A recent example of the team helping to improve business processes is through the development of the AI Attestation process. This will automate the process of adding state employees to the appropriate Active Directory groups following the completion of their AI Attestation submission. Not only will this streamline the process, but it will also allow the SITSD Security team report on details such as who has completed the form, when a form was completed, and what AI tool(s) are in use.

Project – Enhance Security for Online Payment Portals

In response to sophisticated cyber threats targeting State of Montana Online Payment Portals, SITSD quickly implemented a multi-layered security strategy to safeguard citizen data and ensure uninterrupted agency operations. This comprehensive approach included three key measures: First, advanced bot protection protocols were activated on the F5 platform to intercept and block malicious attempts. Second, a daily transaction limit per IP address was established to mitigate the risk of automated attacks. Finally, Okta authentication was integrated into stand-alone payment solutions, adding an extra layer of security. These proactive measures not only thwarted ongoing attempts to exploit the system but also significantly enhanced the overall resilience of the state's digital payment infrastructure against future cyber threats.

Project – Website Migrations and Redesigns

The Technology group has been collaborating with several state agencies on website projects to enhance the utilization of the enterprise content management system, Cascade CMS. Notably, the group has partnered with the Department of Commerce (DOC), Department of Revenue (DOR), and Montana Teachers' Retirement System (TRS). For DOC, the project focused on redesigning and consolidating their websites, streamlining information access for citizens. Meanwhile, the DOR and TRS projects involve migrating their existing websites to Cascade CMS, offering a more secure platform and enabling additional support from SITSD.

SECURITY EXECUTIVE SUMMARY

The State of Montana's IT security teams have made significant strides in enhancing cybersecurity measures and ensuring compliance across various agencies. Key accomplishments include the implementation of Tanium modules for enterprise endpoint management, participation in election security workgroups, establishment of security criteria for cloud migration, and support for the development of a two-year IT strategy. The Enterprise Compliance team has successfully rolled out AI training and attestation, established a vulnerability management program, and completed certification reviews. The Cybersecurity Operations Bureau is actively recruiting key personnel, working closely with the Secretary of State's office to bolster election security monitoring, and exploring next-gen SIEM solutions. The Risk Management Bureau continues to conduct workshops with agencies, review incident response procedures, and align policies with the MT-Base standard. The upcoming National Cybersecurity Review (NCSR) will be a focus from October through January.

Security Architecture

- Implemented seven Tanium modules (Performance, Provision, Enforce, Asset, Reporting, ServiceNow Integration, and Discover) to support enterprise endpoint management needs.
- Participated in election security workgroups with SITSD security office to provide guidance on necessary controls for the upcoming presidential election.
- Established security criteria for migrating the MT.GOV domain to cloud services, aligning with the state's cloud-smart strategy.
- Provided support to agency workgroups in establishing a two-year State of Montana IT strategy.

Enterprise Compliance

- 148 employees statewide completed the GenAI Training and Attestation, aligning with the Generative Artificial Intelligence Acceptable Use Standard published on 05-21-24. Training and attestation tracking now managed through ServiceNow.
- Dedicated Vulnerability Management Analyst, Andrew Alvarez, established communication channels with agencies regarding the use of the Tanium Comply Module.
- Additional risk management analysts trained to assist with Independent Assessment Report reviews.
- Completed certification review for DLI MUSE's transition to FAST for SSA.

Cybersecurity Operations Bureau

- Actively recruiting for a Senior Offensive Security Specialist and a Security Orchestration Automation and Response Specialist.
- Cyber Defense Analysts worked 61 alerts and events in support of Security Consolidation with agencies.
- Collaborating with the Secretary of State's office to enhance monitoring for the upcoming election, including gathering additional endpoint logs, analyzing SIEM dashboards, and reviewing critical infrastructure.
- Initiated a next-gen Security Information and Event Management proof of concept, leveraging machine learning and automated analytics to focus on high-value alerts and true threat activity.

Risk Management Bureau

- Conducting workshops with agencies, including an introduction to the Risk Management Framework, Agency Risk Assessment, system risk assessment, and roadmap for future improvement. Targeting remaining executive branch, cabinet-level agencies by year-end.
- Completed baseline review of the ISIRT manual, kicking off a year-long improvement process. Quarterly drills planned, working with consolidated agencies.
- MT-Base under review. Started a Policy group to better align baseline policies and map to the MT-Base standard, enhancing control family effectiveness.
- Kicking off the NCSR in October, running through January 31st.

OPERATIONS EXECUTIVE SUMMARY

SITSD Service Desk

As the primary support layer for all agency IT and SITSD affiliated agencies, the Service Desk successfully resolved 3,707 cases in the prior quarter. Customer satisfaction score (CSAT) for the prior quarter increased from 4.57 to 4.61. Customer effort score (CES) dropped slightly from 1.72 to 1.7. The Service Desk has been working diligently on prioritizing documentation and working with other internal teams to publish knowledge base articles to speed up case resolution at the tier 1 level.

Customer Success Managers

The customer success managers (CSM) play a pivotal role of ensuring the successful implementation of state agency IT and business endeavors. Their role extends beyond just relationship building; they understand and drive the adoption of SITSD products, services, and collaborate with internal teams on determining what and how information is distributed to support our agency partners. Key accomplishments over the prior quarter include: successful sunset of Citrix, development of a CSM team charter, support for the general election and beginning preparations for the upcoming legislative session.

Network Operations and Security Center (NOSC)

Operating continuously, the NOSC, located at the State of Montana Data Center, is responsible for maintaining the security and smooth functioning of the State's computing and network systems. Over the prior quarter NOSC has handled 6,331 phishing incidents and 1,641 other technical related incidents. During this same time our security automation tool addressed 2,682 phishing incidents. The NOSC also blocked 687 IOCs (Indicators of Compromise).

Enterprise Platforms

Desktop and the Enterprise Services teams continue to work with the SITSD security team to transition to an operational state for the new enterprise desktop management and security tool called Tanium. This software provides modern tools to deploy, maintain and secure end user computers across the enterprise in a consistent and reliable manner. Desktop and Enterprise Services are working to define roles and responsibilities for operations as the implementation partner support ends. The implementation has been successful with Tanium Agents deployed to ~92% of the workstations and ~63% of the servers. Additionally, Desktop and Enterprise Applications completed a successful sunset of the enterprise Citrix environment. This was a significant effort to find alternative technologies for customers.

IT Asset Management

SITSD continues to grow our Enterprise IT Asset Management Community of Practice. The last community learning event was focused on using the ServiceNow Hardware Asset Management (HAM) and Software Asset Management (SAM) tool to its fullest capacity. It was a successfully interactive session, that benefitted multiple areas of ITAM program growth at an enterprise level. The community of practice is expanding to include multiple agencies from across the state. The ITAM Team has collaborated with the ServiceNow Team to implement a new 'Location Code' hardware asset option within the HAM Module. The 'Location Code' addition will allow agencies to better track their IT devices by organizing each asset into a specific location within a building (Office, Conference Room, etc.). This feature is currently in the test phase, scheduled to go into production soon.

INNOVATION AND TRANSFORMATION EXECUTIVE SUMMARY

The Innovation & Transformation Office at SITSD drives innovation, transformation, organizational change and improvement. Our team's mission is demonstrating sustainable excellence within state government and our vision is developing innovative solutions through collaborative partnerships.

Transformation

In the area of transformation, the project managers/release train engineers continue to lead the Tanium implementation, the Risk Management Consolidation program, the DLI Services Discovery project in coordination with the Enterprise Service Lifecycle program. Additionally, this team provides support, training, and facilitation to SITSD in the domains of the scaled agile framework, cross-functional collaboration, and assist with resolving issues and blockers.

IT Contract Services

The Contracts and Vendor Management team manages the IT procurement process for STISD, from initial idea to contract close out. Additionally, this team provides support to agencies on behalf of IT acquisitions impacting the enterprise or individual agencies.

Communications

The Business Communications Manager works closely with the release train engineers, scrum masters, and SITSD leadership to ensure initiatives are widely communicated across various audiences. The Business Communications Manager has also developed and is executing on an enterprise communication strategy to assist with information flow and address the need for impacted and interested staff to be informed about changes occurring.

Training

The Training Coordinator has supported the Tanium implementation by facilitating and coordinating staff access to training. The first and second Tanium Essentials trainings went well. The training team is working with True Zero and the project team to solidify adding a Tanium Essentials training in October 2024.

The Training Coordinator has developed and successfully delivered multiple online and in-person IT training materials to support new software rollouts and end-user adoption. Access the full IT system training library here: https://montana.servicenowservices.com/sp?id=kb_article&sysparm_article=KB0018237

Enterprise Architecture

Application Portfolio Management (APM) is the process of centralized oversight and coordinated control of the business applications and software services across the enterprise. APM provides visibility into the current application portfolio to make better decisions on application rationalization, cloud migration, and future investments to align with business objectives. We have completed our initial load and have loaded over 295 applications. Application rationalization will enable SITSD to reduce overlaps and redundancies by eliminating duplicate or redundant applications.

As part of the APM process, a multi-agency working group has been established to create a statewide tech debt methodology management process, which will be used to inform what data need to be collected. This workgroup held its first meeting in May and has begun outlining how to systematically discover, measure, prioritize, and manage technical debt across our business applications. The next steps for this workgroup will be to finalize the process documentation and develop a detailed implementation plan.

DIGITAL INFRASTRUCTURE EXECUTIVE SUMMARY

Initiative - Cloud Migration

The state has successfully concluded its partnership with a vendor to establish a robust AWS presence, adhering to well-architected principles and frameworks.

These key components have laid the groundwork for an automated and efficient AWS ecosystem. By taking this strategic approach from the outset, the state has:

- Established a framework designed to minimize technical debt
- Positioned itself to accelerate future "as a Service" developments

The completion of this engagement marks a significant milestone in the state's cloud journey, providing a solid AWS cloud foundation that aligns with best practices and sets the stage for scalable, secure, and cost-effective cloud operations moving forward.

Project – Wide Area Network (WAN) Network Upgrades

SITSD has completed upgrades to 109 sites and is currently in the process of upgrading a total of 139 sites across the state. The state will continue to work with telecom providers to upgrade additional sites that align with agency needs. As part of the wide area network (WAN) upgrades, 100 WAN sites are also being configured with software defined- wide area network (SD-WAN). Of these 100 sites, 49 are complete. A full list of the sites planned for upgrades and their status is available on the SITSD Services Portal.

Project – External Firewall Replacement

SITSD has completed the replacement of the external internet facing firewalls. This next generation of firewalls allows for a scalable robust solution that is better suited to protect the State of Montana's assets. The scalability allows for streamlining administration of multiple and complex firewall configurations, providing consistency. The security policies will enable a high-level of protection of State traffic incoming and outgoing to the internet.

Initiative – Process digitization

The Digital Infrastructure office is actively working towards identifying repeatable processes throughout the bureau to automate those processes. This effort is to provide faster response times to customers and allow for documented and consistent configurations throughout the environment.

LEGISLATIVE FINANCE COMMITTEE

CIO Report - 2023-24 Q4 (April 1 – June 30, 2024)

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

- None

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

Information Technology Procurement Requests (ITPR)

- Total Number of ITPRs* – 335
- Denied ITPRs – 0
- Total Costs – \$196,557,267.49
- Annual Ongoing Cost – \$70,262,569.38
- ITPRs with \$0.00 Cost – 77

*Includes ITPRs submitted with only \$1.00 reported as cost.

Agency Procurement Report

- Total number of IT items purchased – 850
- Total amount of IT items purchased - \$812,197.37
- Agencies – FWP, ART, STF
- Items included - Desktop PCs, Approved Software, non-networked prints, PC accessories, UPS

LEGISLATIVE FINANCE COMMITTEE

Project Portfolio Summary - 2023-24 Q4 (April 1 – June 30, 2024)

56 Total Projects

- 41 Green Overall Health Status Projects
- 13 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)
 - AGR – SAFHER Federal System
 - COR – Offender Management System Implementation
 - DOA - E-Discovery-Public Information Request Software
 - DNRC – Fire Financial Information System
 - DNRC – FSO Financial Management System
 - DNRC – TLMS Customer Portal
 - HHS - EBT Replacement
 - HHS - Facilities Electronic Health Records & Billing System (EHR)
 - HHS – Interoperability – Integration (MES)
 - HHS – Interoperability – Mobile Engagement (MES)
 - HHS - Pharmacy Benefits Management System Replacement (MES)
 - HHS – SEARCHES Replacement
 - HHS – SNAP Employment & Training
- 2 Yellow Overall Health Status (Supplemental Reports Located in Dashboard)
 - DEQ – Coal Information Management System (CIMS): Phase 1
 - FWP – ExploreMT
- 0 Red Overall Health Status (Supplemental Reports Located in Dashboard)
- 11 Total Closing Projects
 - DLI – MUSE
 - DNRC Water Rights Information Systems II
 - DOA – Montana Cybersecurity Enhancement
 - DOA – Local Government Service CRM
 - HHS – Care Management – Release 2.5b (MES)
 - HHS – Care Management Enhancement: Assessment (MES)
 - HHS - CHIMES Resource Referral Engine – Phase 2
 - HHS – Electronic Visit Verification – Release 2 (MES)
 - HHS – System Integration Services – High Availability Phase 1 (MES)
 - LIV – Livestock Interface Systems Upgrade Project
 - SOS – ElectMT
 - STF – Insurance Policyholder and Agents Portals