



11.02 %

14.81 %

Statistic Graph  
All mentions:



#	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\$

Statistic Graph  
All mentions:



Statistic Graph  
All mentions:



Statistic Graph  
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2015

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2019

2014

2016

2018

2020

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Statistic Graph  
All mentions:



March 20

2025

# QUARTERLY REPORT

INFORMATION  
TECHNOLOGY  
BOARD

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## MEETING OVERVIEW



Thursday, March 20, 2025



10:00 a.m. – 12:00 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

James Brown

**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**

## December 19, 2024 Minutes

<p><b>Members Present</b> Carrie Albro, HHS Andy Campbell, OPI</p> <p><b>Guests</b> Denise Adamson, SITSD Elle Arredondo, SITSD Katy Brandis, SITSD Christie Breland, DOR Rawlin Richardson, SITSD Chris Santucci, SITSD</p>	<p>Kevin Gilbertson, SITSD-Chair Michael Sweeney, SAO</p> <p>Eli Dean, OPI Megan Donovan, Adobe Phillip English, PSC Andrea Gordon, SITSD Julia Caro, OPI David Swenson, MPERA</p>	<p>Kellee English, SOS Sonia Powell, GOV</p> <p>Kari Hahn, DOA Peggy MacEwen, BOI Annie Murdock, SITSD Katelyn Schaub, SITSD Matt Van Syckle, KWR Strategies</p>
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### Welcome

- (00.00.03) Recording Announcement, CIO Support Staff
  - (00.00.37) Introductions
- (00.03.14) Chair Remarks, Kevin Gilbertson
  - (00.03.54) Motion by Michael Sweeney and Carrie Albro Second Review and Approve October 17, 2024 [Minutes](#)

### Business

- (00.04.22) Operational Overview, Kevin Gilbertson

### Discussion

- (00.18.30) Member Forum/Suggestions
- (00.18.30) Future Priorities
- (00.18.50) Public Comment

### Adjournment (00.19.50)

- Next Meeting
  - March 20, 2025
  - 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 December 19, 2024, Meeting [Minutes](#)

### Business

- Operational Overview

### Discussion

- Member Forum/Suggestions
- Future Priorities
- Public Comment

### Adjournment

Next Meeting  
Thursday, June 19, 2025  
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](#)

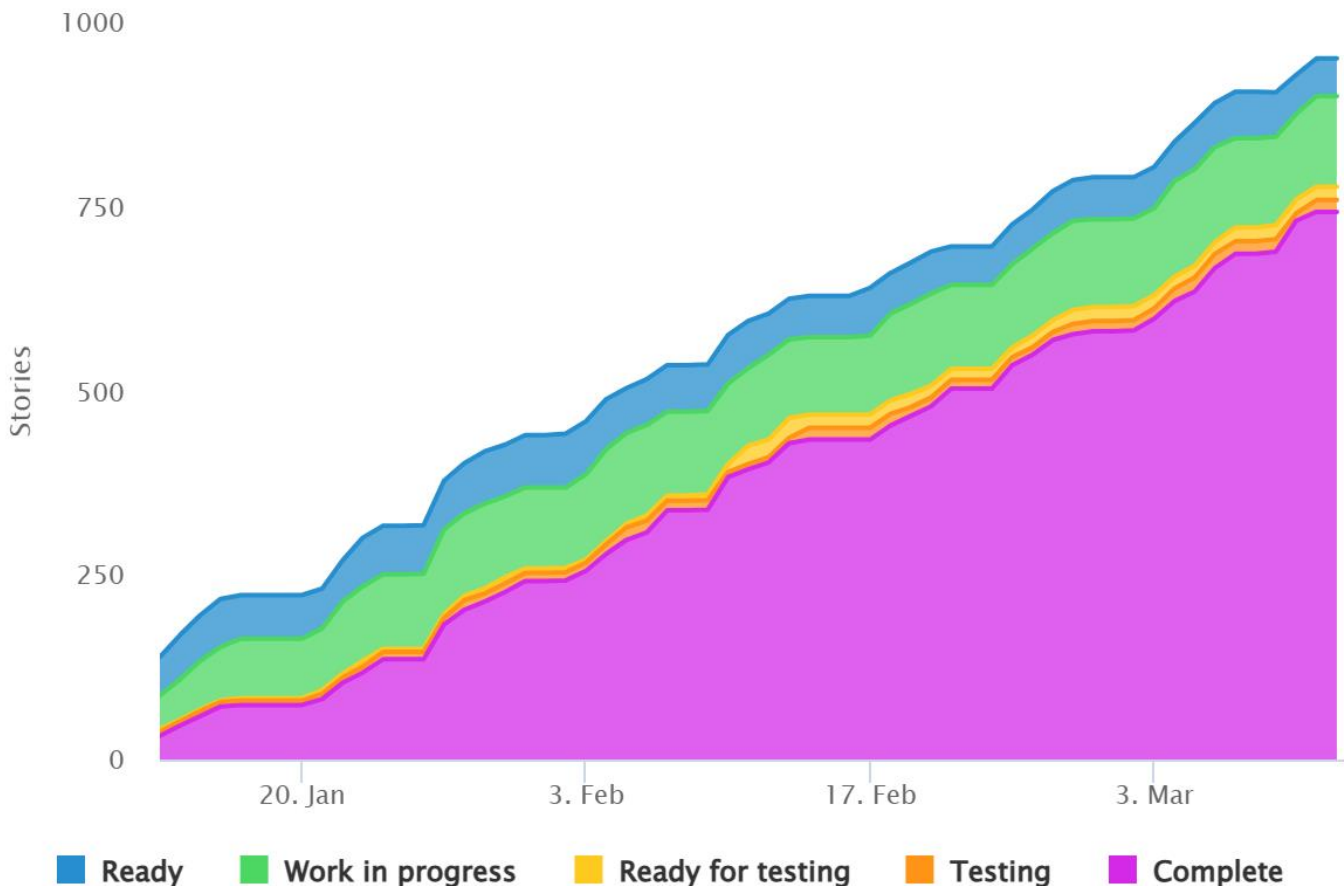
## SITSD Program Increment (PI) Planning

SITSD is wrapping up PI 25.1 and is beginning planning preparation for PI 25.2. Ongoing activities include:

- Held PI 25.1 planning event on January 8<sup>th</sup>-9<sup>th</sup>.
- Defined business goals and priorities for this increment.
- Identified and mitigated risks and dependencies.
- Improved collaboration through cross-functional alignment sessions.
- Facilitated several team improvement and team formation workshops.

**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's finance team has been working with Proven Optics on data gathering for the implementation of the Budgeting and Forecasting Model and the Cost Model. The Cost Model will improve the visibility of understanding what goes into a rate and will help track the total cost of ownership of services. We are in the User Acceptance Testing (UAT) phase for the implementation of the Budgeting and Forecasting Model and are working closely with the Proven Optics on bugs and issues. We will begin UAT for the Cost Model once UAT for budgeting is complete. This system will replace Techbudget during our next budgeting cycle.

SITSDs budget was reduced by \$3.6M for the 2027B 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, many of which have be subject to increases of roughly 10%. SITSD 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 four key initiatives and two projects 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 – 508 Compliance Evaluations**

In response to the United States Department of Justice rule under Title II of the Americans with Disabilities Act (ADA) mandating the accessibility of web content and mobile applications for individuals with disabilities, the Technology group continues to mitigate accessibility issues throughout prioritized websites and applications. Websites and applications are being prioritized based on the impact and usage of the service, and the level of effort required to mitigate reported issues.

In addition, an Enterprise 508 Compliance Task Force has been formed and will be challenged with completing key objectives focused on creating a robust framework for achieving and maintaining Section 508 compliance across our digital landscape. The task force is expected to include representation from each agency and will officially kickoff in the coming quarter.

### **Initiative – Quality Assurance Program**

The Technology group has identified a critical gap in our development process regarding effective quality assurance (QA) and regression testing for websites and applications. In response, we have initiated the creation of a comprehensive Quality Assurance Program within the bureau. With the successful hiring of a QA Specialist, the initial objectives of this program will include determining which current projects and initiatives need immediate QA assistance, documenting gaps in our existing QA processes, knowledge and training, and recommending areas of process standardization across the Technology Office.

### **Initiative – Reduction of Technical Debt**

The Technology group has launched a comprehensive initiative to address technical debt across all platforms and applications, balancing immediate concerns with long-term strategic planning. The team has made continual progress in completing end-of-life server upgrades for numerous applications, completed application upgrades to bring systems into supported versions, and continues to inventory other technical debt areas to address moving forward. In addition, there are ongoing efforts focused on modernizing key enterprise applications such as the Online Payment Portals and the Risk Management and Tort Defense Division's Property and Casualty Insurance Information System (PCIIS). The PCIIS application houses everything the State of Montana insures, and the modernization efforts will prevent disruptions to processing insurance information across the enterprise.

### **Initiative – Digitization of Business Processes**

The Technology group is actively expanding its collaborative efforts with state agencies to identify and implement 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. Notable recent successes include rebranding the Made in Montana Portal, updating the Badge Access Workflow, and updating the Archer System Registration form. The rebranding of the Made in Montana portal aligned the user interface with the new branding guidelines for the Department of Commerce, which matches their recent website redesign. The updates to the Badge Access Workflow were an effort to simplify and streamline the creation of State of Montana employee badges and providing the necessary building access. In addition, the workflow now keeps an electronic record of access changes for audit purposes. Similarly, the updates to the Archer Registration Form were an effort towards making the form simpler and more user-friendly which will help make the process of System Security Plan allocations faster. These improvements demonstrate the Technology group's commitment to optimizing state agency operations through innovative digital solutions, ultimately leading to enhanced productivity and service delivery across the organization.

## TECHNOLOGY EXECUTIVE SUMMARY Continued

### **Project – Enhance the Ability to Track Time**

The Technology group completed phase one of a comprehensive initiative to enhance data-driven decision-making across multiple domains, including project prioritization, revenue generation, and staff utilization. Phase one of this project enabled staff to more accurately categorize their time allocation between project-specific work, operational tasks, and time off, which has allowed the Technology Office to begin tracking staff utilization. This metric has provided critical insights into where the majority of our staff time is being spent and allows us to quickly see correlations between utilization, current projects, and revenue generation.

Phase two of this initiative will include critical enhancements to the existing Time Tracking application. These enhancements will be geared towards making time entry less of a burden on staff and expand reporting capabilities.

### **Project – Website Migrations and Redesigns**

The Technology group has made significant strides in enhancing the utilization of the enterprise content management system, Cascade CMS, through collaborative efforts with multiple state agencies. The team is continuing to partner with the Department of Revenue (DOR) and Montana Teachers' Retirement System (TRS) to facilitate their website migrations to Cascade CMS. Both website migrations are slated to be completed following the Legislative Session. This transition offers these agencies a more secure platform with enhanced SITSD support, while simultaneously reducing technical debt and eliminating redundant systems. In addition, the team is working with other agencies to determine if Cascade CMS will meet their website needs. By leveraging Cascade CMS across these agencies, the Technology group is not only improving digital infrastructure but also fostering a more cohesive and manageable online presence for state services.

## SECURITY EXECUTIVE SUMMARY

The organization made notable progress in enhancing its overall cybersecurity posture and operational resilience. Key achievements include processing and mitigating numerous phishing threats, advancing Zero Trust initiatives, and improving endpoint security coverage. Significant strides were made in risk assessment processes, compliance with regulatory standards, and vendor evaluations, alongside the development of streamlined workflows and governance improvements. These efforts collectively demonstrate a strong commitment to proactive threat management, risk mitigation, and alignment with industry best practices.

### Security Architecture

- Conducted Zero Trust identity access management planning session
- Established new ARB firewall review process
- Advanced Entra ID conditional access policies
- Developed mt.gov cloud ServiceNow workflow draft
- Initiated mt.gov ServiceNow form workgroup with workflow documentation
- Advanced Tanium project through True Zero access decisions
- Attended Zero Trust summit
- Completed phase 1 testing for mt.gov ServiceNow request form
- Met with Google to explore SecOps platform and Zero Trust architecture solutions

### Risk Management Bureau

- Established Archer Governance meeting
- Advanced ISSO handbook for Rapid ATO Assessments
- Completed NCSR for Department of Administration
- Completed DOR RM Consolidation Workshop
- Initiated DMA Gap Assessment
- Progressed on DPHHS workshops and risk assessment
- Advanced work on control guidebook for Fast ATO processes
- Established SSP assessment review process
- Enhanced risk assessment forms to align with organizational risk tolerance goals

### Cybersecurity Operations Bureau

- Processed 125 phishing cases, blocking 361 domains and 71 IPs
- Conducted threat hunting in OCI, blocking 7 additional IPs
- Reviewed over 2,000 IOCs and blocked 687 malicious IPs
- Resolved 156 phishing cases, blocking 34 IPs and 1,557 domains
- Achieved 40% remediation in S1 missing agents audit
- Successfully deployed Tanium Satellite server
- Processed and blocked 6 IPs and 1,544 domains from MS-ISAC
- Held 2nd annual Sentinel One admin and threat hunting training
- Reduced Sentinel One audit gaps to 221 devices without S1

## SECURITY EXECUTIVE SUMMARY Continued

### Enterprise Security Compliance

- Completed Data Classification Guideline
- Advanced Program Management Standard
- Processed multiple contracts including Netsmart and EBT Conduent
- Progressed on IRS SSR for DLI
- Completed ESO contract work
- Finished SOC 2 Type 2 analysis for multiple vendors
- Reviewed SOC 2 Type 2 reports for Conduent (HHS contracts)
- Advanced IRS SSR efforts for DLI
- Completed WOTC assessment for ServiceNow suitability at DLI

### Conclusion

The collective efforts across these bureaus demonstrate a robust approach to securing Montana's digital infrastructure. From proactive risk assessments to operational excellence in threat management, these accomplishments reflect a strategic alignment with the state's cybersecurity priorities. Continued collaboration across teams will further enhance resilience against evolving threats.

## OPERATIONS EXECUTIVE SUMMARY

### SITSD Service Desk

As the primary support layer for all agency IT and SITSD affiliated agencies, the Service Desk successfully resolved 4,391 cases in the prior quarter. CSAT for the prior quarter increased from 4.61 to 4.69. CES dropped from 1.7 to 1.58. 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: providing ongoing legislative support, continued ITPR-related agency support, support during the primary election and supporting the enterprise with the Tanium implementation.

### 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 2,774 phishing incidents and 1,132 other technical related incidents. During this same time our security automation tool addressed 2,309 phishing incidents.

### Enterprise Platforms

Desktop and the Enterprise Services teams continue to transition to an operational state for Tanium, the new enterprise desktop management and security tool. Desktop migrated existing customers and assisted other agencies with process, setup, and best practices in their own Tanium environments. The Enterprise Applications team has focused on post go-live support efforts for Syncpanel, which replaced Microsoft Identity Management. Syncpanel links SABHRS to Active Directory for account creation and status changes. The ServiceNow platform team has been working on a new foundational data model as part of the Enterprise Platform Initiative. This initiative will optimize IT operations and agency business services through a multi-instance strategy and architecture. The Enterprise Services team has been addressing Splunk storage challenges by moving data to more cost-effective options and has started to decommission servers and free up storage space for other uses.

### IT Asset Management

SITSD continues to grow our Enterprise IT Asset practice. Over the last quarter, the ITAM team has made significant progress in processing bulk device orders for DLI, enhancing our communication with agencies, and improving workflows through team collaboration. Recent collaborations include refining data entry validation and exploring automation opportunities, regular updates and proactive engagement with agencies. These efforts have strengthened relationships and streamlined asset management and onboarding processes.

## 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 Platform Initiative. Additionally, this team provides support, training, and facilitation to SITSD in the domains of the scaled agile framework, cross-functional collaboration, and assists with resolving issues and blockers.

### IT Contract Services

The Contracts and Vendor Management team manages the IT procurement process for SITSD, 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 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](https://montana.servicenowservices.com/sp?id=kb_article&sysparm_article=KB0018237)

### Enterprise Architecture

The Enterprise Architecture team has broadened its scope by incorporating Business Process Architecture management into its program area. This addition strengthens our business domain capabilities and provides a more complete enterprise architecture framework. We have also implemented the Technology Reference Model (TRM), which serves as a standardized taxonomy for technology products and services across the enterprise. The TRM enhances technology governance and facilitates strategic planning by providing a common language and framework for technology decisions.

Application Portfolio Management (APM) continues to expand its coverage across the enterprise, nearly doubling the enterprise application portfolio from 377 business applications to 651. This comprehensive visibility enables informed decision-making for application rationalization, cloud migration, and strategic investments aligned with business value objectives.

Our Configuration Management Database (CMDB) has undergone significant expansion and now encompasses all departmental endpoints, servers, and networking equipment. This enhanced visibility provides valuable insights for infrastructure management and planning.

## DIGITAL INFRASTRUCTURE EXECUTIVE SUMMARY

### **Initiative – Infrastructure Strategy**

The Technical Architecture Group, comprised of experts from various SITSD bureaus, has identified a primary goal of developing a comprehensive infrastructure strategy for the State Enterprise. This strategy will focus on establishing a secure and modernized infrastructure through standardized hardware and network architecture, ensuring scalability, defining strategic data management practices, and implementing secure software solutions, all while supporting the business needs and long-term goals of state agencies.

### **Project – Internal Firewall upgrade**

The Network Design team has been coordinating project objectives and migration strategies for the internal firewall project. During the first quarter of 2025, the efforts have been focused on a clean transition from 6 physical firewall instances collapsing into a robust HA platform configuration. The upgraded platform allows for efficiencies due to a unified configuration for both internal and external firewalls and enhanced security features to align with the ZeroTrust framework initiative. This effort will include multiple coordinated efforts with the State agencies and the SITSD Infrastructure teams.

### **Project – State building projects**

SITSD Digital Infrastructure has assisted various agencies with remodeling efforts to maximize and update existing State spaces. SITSD Network Operations and Voice Operation teams have managed, installed, and conducted cabling and VoIP phone moves for DOJ, DEQ, HHS, Legislative Services, and the Museum. Each project as follows:

- DOJ Mazurek is completed
- DEQ Metcalf is in the initial stages of vacating staff to start remodel efforts
- HHS First Interstate Bank remodel, expected completion of July 2025
- HHS Cogswell Lab phase 2 has successfully started, expected completion end of October 2025.
- Leg Mitchell Building 4<sup>th</sup> Floor for Legislative Audit Division expected completion end of May 2025.
- Museum continuing, expected completion end of 2025

### **Initiative – Process digitization**

The Digital Infrastructure office is continuing to identify and refine 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. Noted above, the Infrastructure office worked with the Technology office to refine the Badge Access workflow to further enhance the process to expedite building access for state employees.



## LEGISLATIVE FINANCE COMMITTEE

### CIO Report – Fiscal Year 2025 Quarter 2 (October 1 – December 31, 2024)

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

1. MDT Hardware Procurement Exception

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

1. 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)

1. Enterprise Acceptable Use Policy
2. Elevated Accounts Standard
3. State of Montana Utilizing Domain in the Cloud Security Guidance
4. Travel Guidance

#### Information Technology Procurement Requests (ITPR)

1. Total Number of ITPRs\* – 244
2. Denied ITPRs – 0
3. Total Costs – \$189,753,291.59
4. Annual Ongoing Cost – \$204,363,717.64
5. ITPRs with \$0.00 Cost – 35

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

#### Agency Procurement Report

1. Total number of IT items purchased – 6,823
2. Total amount of IT items purchased - \$582,244.61
3. Agencies – FWP, ART, AGR, BPE, GOV, HIS, LIV, MDT, SAO, DOR, STF
4. Items included - Desktop PCs, Approved Software, non-networked prints, PC accessories, UPS

## LEGISLATIVE FINANCE COMMITTEE

### Project Portfolio Summary – Fiscal Year 2025 Quarter 2 (October 1 – December 31, 2024)

#### 66 Total Projects

- 54 Green Overall Health Status Projects
- 9 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
  - 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
- 3 Yellow Overall Health Status (Supplemental Reports Located in [Dashboard](#))
  - DEQ – Coal Information Management System (CIMS): Phase 1
  - DOJ – Credentialing Registration System (CARS)
  - FWP – ExploreMT
- 0 Red Overall Health Status (Supplemental Reports Located in [Dashboard](#))
- 9 Total Closing Projects
  - DNRC - Water Rights Information Systems II
  - DNRC – Flathead Reservation IT Management System
  - DOA – Montana Cybersecurity Enhancement
  - DOA – Local Government Service CRM
  - HHS – System Integration Services – High Availability Phase 1 (MES)
  - HHS – System Integration Services – High Availability Phase 2 (MES)
  - HHS – System Integration Services – High Availability Phase 3 (MES)
  - SAO – Securities and Insurance Investigations Management System (SIIMS)
  - STF – Insurance Policyholder and Agents Portals