



March 2026

# Quarterly Report

Information Technology Board

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# MEETING OVERVIEW

## Meeting Details

Thursday, March 26, 2026

10:00 a.m. – 12:00 p.m.

## Members

<b>Name</b>	<b>Organization</b>
Misty Ann Giles	Administration
James Fehr	Environmental Quality
John Daugherty	Corrections
Braxton Mitchell	House Representative
Ryan Davies	Judicial Branch
Austin Knudsen	Justice/Attorney General Office
Jerry Howe	Legislative Services
Vacant	Local Government
Sean Higgenbotham	Local Government, Cascade County
Ryan Osmundson	Office of Budget and Program Planning
Susie Hedalen	Office of Public Instruction
Laef Olson	Private Sector
Charlie Brereton	Public Health and Human Services
Jennifer Fielder	Public Service Commission
Christi Jacobsen	Secretary of State
Daniel Zolnikov	Senate
James Brown	State Auditor
Kevin Gilbertson – Chair	State IT Services Division



# MINUTES

January 29, 2026

## Attendance

### Members Present

Aber Thorvilson, SAO

Amy Sassano, GOV

Austin Lindsay, SOS

Carrie Albro, HHS

Kevin Gilbertson, SITSD -  
Chair

Christie Breland, DOR

Daniel Zolnikov, Senate

Dylan Martin, OPI

Jennifer Fielder, PSC

Laef Olson, Private Sector

Michele Snowberger,  
DOA

Daniel Donithan, SITSD

David Swenson, TRS

Elle Arredondo, SITSD

Errolyn Lantz, GOV

Evelyn Davis, GOV

Jessica Ritchie, SITSD

Missy McLarnon, DOJ

Rep. Braxton Mitchell,  
Representative

Ryan Davies, JUD

Sean Higginbotham,  
Cascade County

Katelyn Schaub, SITSD

Katy Brandis, DOA

Matt Van Syckle, KWR  
Strategies

Rawlin Richardson,  
SITSD

Samantha Mongoven,  
Tyler Tech

Sharon Duncon, MDT

## Welcome

- (00.00.04) Recording Announcement, CIO Support Staff
- (00.00.37) Introductions
- (00.03.33) Chair Remarks, Kevin Gilbertson
- (00.03.49) Motion by Amy Sassano and seconded by Jennifer Fielder to Approve September 25, 2025 [Minutes](#)



## Business

- (00.05.01) IT Integration Overview, Kevin Gilbertson
- (00.11:46 Review and Approve Operating Procedures, Kevin Gilbertson. Motion by Amy Sassano and seconded by Jennifer Fielder to approve the revised operating procedures.
- (00.16.15) Operational Overview, Kevin Gilbertson

## Discussion

- (00.42.45) Member Forum/Suggestions
- (00.57.19) Future Priorities
- (00.58.27) Public Comment

## Adjournment

- (00.59.13) Motion by Dylan Martin

## Next Meeting

Thursday, June 25, 2026

10:00 a.m. – 12:00 p.m.

Zoom Meeting



# AGENDA

1. Welcome
  - a. Recording Announcement
  - b. Introductions
  - c. Chair Remarks
  - d. Review and approve previous meeting minutes
2. Business
  - a. IT Integration Overview
  - b. State IT Strategy Draft Review
  - c. Operational Overview
3. Discussion
  - a. Member Forum
  - b. Future Priorities
  - c. Public Comment
4. Adjournment
  - a. Next Meeting  
Thursday,  
10:00 a.m. – 12:00 p.m.  
Zoom Meeting



# IT INTEGRATION OVERVIEW

## IT Integration Summary

Montana is executing a Governor-directed IT integration to move from a decentralized to a centralized, enterprise IT model in the Executive Branch. The work has progressed through discovery and office design is being finalized. The project will be moved into the execution and transition phase with a new organizational design being finalized. In addition, SITSD is conducting agency meetings in March to finalize exempt systems, and which staff are to be included in the integrated model.

Extensive stakeholder engagement has surfaced strong expectations that IT act as an enabler, foster cross-agency learning, and protect positive agency cultures during consolidation. To demonstrate value and maintain trust, a KPI framework has been defined, including targets for ticket backlog, time to resolve high-priority issues, customer satisfaction and effort, project delivery, system uptime, security posture, and long-term cost per user, positioning the state to show measurable improvements as centralization is implemented.

# OPERATIONAL OVERVIEW

## SITSD Program Increment (PI) Planning

SITSD is in the middle of PI 26.1. Activities for this quarter included:

- Held PI 26.1 planning event on January 14th-15th.
- 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.
- Prepare for PI 26.2 planning on April 22nd-23rd.



## 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.

The Enterprise IT Financial Workgroup (EITFW) last met in March 2025 and is on hold until further discovery and planning for Enterprise IT Integration is completed. This does not extend to the Enterprise IT Asset Management community of practice, which will continue meeting and providing training events.

As financial and/or procurement discussions are needed, the State CIO or Deputy State CIO will engage Agency leadership.



## SITSD Executive Summaries

The SITSD Executive Summaries provide a quarterly update on the operations, projects and initiatives prioritized by each of the following teams:

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

## Technology Executive Summary

The Technology Office at SITSD continues to focus on development and application hosting services that strengthen enterprise technology capabilities across the State government. Over the last quarter, the team has advanced several key initiatives aimed at improving digital accessibility, enhancing quality assurance practices, and modernizing hosting and deployment environments. Together, these efforts reflect ongoing progress towards greater efficiency, consistency, and compliance in statewide digital services.

### *Initiative – ADA Title II Accessibility Evaluations and Remediation*

The Enterprise ADA Compliance Task Force continues to advance enterprise-wide remediation efforts, with current work focused on finalizing the updated State accessibility policy and developing the detailed roadmap agencies will be required to complete for any websites or applications that will not achieve full conformance by the April 24, 2026 deadline. These roadmaps will help ensure progress is clearly documented, monitored, and reported across agencies.

On the technical front, the Technology Office continues its collaboration with agencies to address accessibility and compliance issues across web and application platforms. Over the past quarter, the team has made progress on the Department of Administration (DOA) website consolidation project and ongoing remediation efforts with the Department of Agriculture (AGR), the Office of Public Instruction (OPI), the Office of the State Public Defender (OPD), and multiple State Information Technology Services Division (SITSD) websites. In parallel, accessibility improvements are underway within the ServiceNow platform, with current efforts focused on public-facing portals and a planned transition to internal-facing portals and related assets in future phases.

In the coming quarter, the Technology Office will continue supporting agency remediation projects, provide targeted technical assistance, and coordinate the rollout of updated accessibility guidance and policy resources statewide.

### *Initiative – Quality Assurance Program*

The Quality Assurance (QA) Program continues to evolve as a key pillar of the Technology Office's development lifecycle. Following the comprehensive 360-degree assessment conducted with Nagarro, teams are now actively implementing the resulting recommendations to strengthen and align QA practices across all development sections.

Current efforts are focused on defining and documenting roles and responsibilities, establishing consistent approaches to test case development and linking, improving test readiness activities, and standardizing defect reporting and tracking. These improvements are designed to ensure a unified, repeatable QA framework that supports efficient collaboration, consistent quality outcomes, and greater visibility across projects.

In the coming quarter, the Technology Office will continue to mature the QA Program through iterative refinement of these processes and by expanding enterprise alignment efforts to ensure that QA standards and practices are embedded across all technology initiatives.

*Initiative – Containerized Application Hosting Environment*

As of PI 26.1, the Technology Office has implemented an efficient, scalable, and flexible application deployment model within the Containerized Hosting Environment, building on lessons learned from previous engagements and proof-of-concept efforts. Members of the Software Factory, AI Office, and Application Hosting teams have partnered to deploy three new applications to production environments, with an additional five currently in the pipeline.

These containerized applications are platform agnostic, built on a Zero-CVE base image architecture, and hosted within State of Montana on-premise image registries. This approach enhances security, consistency, and maintainability while aligning with enterprise modernization priorities.

The ongoing development of the platform focuses on achieving several key outcomes: pre-deployment vulnerability scanning, SBOM (Software Bill of Materials) indexing, and deployment policy enforcement; process isolation and portability; improved resource efficiency; and enhanced operational observability across all stages of the software supply chain. Together, these capabilities position the State to deliver secure, reliable, and rapidly deployable digital solutions at scale.

## Security Executive Summary

The Office of Information Security at SITSD advanced cybersecurity operations, incident response, compliance, risk management, and enterprise security architecture during the quarter. The Cybersecurity Operations Bureau triaged and closed 1,160 security cases and maintained a 64% true-positive rate across detections targeting State of Montana technology resources. The bureau also onboarded 11 new ingestion sources into the State's enterprise security information and event management platform, reviewed 1,686 phishing submissions, and identified and blocked 35 unique phishing campaigns.

### *Initiative – Cybersecurity Operations and Incident Response*

Security operations continued to mature through higher-fidelity monitoring, expanded visibility, and timely containment of malicious activity. On February 11, 2026, malware on an endpoint provided a threat actor visibility into a user's network traffic; the device was quarantined and reimaged to stop further activity. On February 12, 2026, malware attempting to execute malicious code was detected and similarly contained through quarantine and reimaging. On February 17, 2026, a threat actor exploited a vulnerable public-facing service and obtained administrative access to multiple endpoints; affected devices were quarantined, forensic analysis was performed to identify additional indicators of compromise, and information was shared with the threat community.

### *Initiative – Compliance and Governance*

The compliance program partnered closely with DPHHS business and system owners to remediate critical CMS findings in the CHIMES system, completing corrective actions, documentation updates, and compliance monitoring needed to restore full federal authorization for system connectivity. The team also worked with DPHHS program leads and internal compliance staff to resolve corrective action plan findings for the SEARCHS system, implementing remediation and validation steps to align with CMS security and compliance expectations. At the enterprise level, security staff continued oversight of Information Technology Procurement Requests, ensuring proposed solutions, contracts, and funding requests align with State security standards, Montana Code Annotated requirements, privacy obligations, and enterprise policy. During the quarter, the office also authored the Security Program Management Standard and revised the Critical and High Vulnerability Management Standard to strengthen statewide governance, accountability, and compliance alignment.

*Initiative – Risk Management, Resilience, and Continuity*

Risk management and resilience efforts focused on improving readiness, documentation, and interstate coordination. Through SWIC coordination, planning began to restart the Western Borders Interoperability Group with Saskatchewan to support emergency communications between Montana and Saskatchewan. The resilience team drafted foundational materials for the ongoing integration effort, including a Resilience Office and DES RACI chart, a proposed MOU between SITSD and DES, and continuity coordinator roles and responsibilities.

Additional work included planning a spring 2026 coordinator conference, initiating weekly enhancement sessions with Archer support for better BC/DR reporting and automated data feeds, adding Microsoft Teams as a notification channel for Everbridge, and updating the ISIRT Manual to reflect integration impacts. The enterprise team also continued validating priority systems and common controls, advancing priority system security plans, supporting audit finding mitigation, assisting SABHRS continuous monitoring, supporting ServiceNow authorization efforts for NOVA and ACCELERATE, and contributing to Archer upgrade and network control assessment planning.

*Initiative – Security Architecture and Enterprise Enablement*

Security architecture remained focused on embedding controls early in enterprise initiatives through strategic planning, roadmap and PI planning participation, architecture review, and support for identity modernization and infrastructure discovery efforts. The team advanced security tooling and optimization work across SentinelOne, Tanium, SBOM and Comply capabilities, and Zscaler planning, while also tracking results from CompuNet assessments of virtual and Tanium environments. Architecture and operations leadership continued review and approval of firewall changes, Azure user-at-risk activity, KEV updates, and escalated phishing activity. Governance support also continued through contributions to the updated vulnerability management standard, integrated service delivery and security office design, and efforts to formalize security as a defined enterprise service.

*Initiative – Workforce Development and External Engagement*

The office continued investing in professional development, operational enablement, and external leadership. Staff completed ISACA CISM and AAISM certifications, the ISC2 CISSP certification, supported AI usage monitoring pilots, and planned cybersecurity-related speaking opportunities for the 2026 Montana Digital Government Summit. Team members also participated in learning opportunities through RSAC, CIS, and SecureMontana and engaged in vendor briefings on Wiz, SentinelOne, Zscaler, and other technologies to inform enterprise decision-making and maintain awareness of emerging capabilities.

## Operations Executive Summary

### *SITSD Service Desk*

As the primary support layer for all agency IT and SITSD affiliated agencies, the Service Desk successfully resolved 3,691 cases in the prior quarter. CSAT for the prior quarter increased from 4.65 to 4.70. Customer Effort Score (CES) also improved from 1.65 to 1.58. The Service Desk has been working diligently on establishing MVP for incident management in ServiceNow, with a demo prepped for leadership.

### *Customer Success Managers*

The Customer Success Managers (CSMs) serve a critical function in ensuring the effective implementation and sustained success of state agency information technology and business initiatives. Their responsibilities extend well beyond relationship management, encompassing the promotion and adoption of SITSD products and services, strategic collaboration with internal teams to optimize communication and information sharing, and the facilitation of cross-agency engagement. Key accomplishments during the prior quarter include proactively supported agency partners through strategic partnership and enablement across a wide range of IT initiatives; strengthened cross-functional collaboration by bridging agencies, vendors, legal teams, developers, and internal SITSD staff to drive projects forward; ensured compliance and mitigated risk through licensing, accessibility, and policy coordination efforts; and advanced modernization and operational efficiency through system upgrades, process improvements, and updated internal documentation.

### *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 the NOSC and the Security team has handled 3,038 phishing incidents and 1,131 other technical incidents. During this same time our security automation tool addressed 1,470 phishing incidents. The NOSC is also leading the effort to establish MVP for change management in ServiceNow.

### *Enterprise Platforms*

The Desktop Services team advanced initiatives on RSA reduction, Intune for Android, and Intune Kiosk Mode. The Enterprise Applications team partnered with State HR to prepare for an integration snapshot. The Enterprise Services team developed a plan for Splunk to reduce usage and cost prior to renewal. The ServiceNow Platform team continued

configuration of the Nova IT Operations instance and supported process owners in preparing working software demos for sponsors.

### *IT Asset Management*

This quarter, the IT Asset Management (ITAM) team partnered closely with stakeholders to support User Acceptance Testing (UAT) for the new ServiceNow instance. The updated platform introduces significant improvements to the incident and asset management experience for both agency users and technical support teams. The new configuration automates workflows, improves data accuracy, and creates a more intuitive interface, allowing technical assistants to resolve requests more efficiently while giving agencies greater transparency into their hardware and software assets. By strengthening data accuracy and centralizing information, the platform will help the State of Montana reduce redundant purchases, manage lifecycle planning more effectively, and ultimately save costs.

## Innovation and Transformation Executive Summary

The Innovation & Transformation Office (ITO) continues to demonstrate sustainable excellence by serving as the State Information Technology Services Division's internal consulting partner for complex, enterprise technology change. Our teams enable SITSD and agency leaders to turn strategy into executed outcomes through structured program management, governance, organizational change management, and enterprise architecture services.

Over the next quarter, ITO will further refine its demand and prioritization funnel, continue to support enterprise finance integration and security initiatives, and focus on sustaining the playbooks, templates, and patterns developed this biennium so they can be replicated long after individual projects conclude.

### *Strategy*

- Refined the Balanced Scorecard framework to give executive leadership clearer, measurable indicators of technology value, including business and citizen impact.
- Actively managed the enterprise demand funnel, using a robust prioritization process that concentrates limited resources on the highest-value initiatives and exposes misaligned or low-value work earlier.
- Supported enterprise finance and integration planning that underpins the broader enterprise IT integration effort, aligning technology investments with statewide priorities and upcoming budget and implementation milestones.

### *Transformation*

- Provided structured program management, facilitation, and coaching for the Enterprise Platform Initiative and other enterprise efforts, helping cross-agency teams move from concept to coordinated delivery.
- Developed and socialized reusable playbooks, templates, and working agreements that are now being adopted as models by other teams, improving consistency and quality across initiatives.
- Led and coached SITSD and partner agencies on scaled-agile practices, cross-functional collaboration, and issue resolution, accelerating progress on key programs while reducing bottlenecks.

### *IT Contract Services*

- Managed multiple complex, high-value IT procurements and enterprise contracts in partnership with state procurement to maximize value for the enterprise.



- Supported agencies in navigating IT acquisitions that affect both individual programs and the broader enterprise, reducing risk and improving alignment with statewide standards.
- Advanced a stronger emphasis on vendor performance management, reinforcing expectations that strategic vendors act as true partners in Montana's initiatives and are accountable for outcomes, not just transactions.

### *Communications*

- Continued to refine and execute an enterprise IT communication strategy that delivers clear, timely messaging about major initiatives, decisions, and changes to impacted audiences across the executive branch.
- Strengthened feedback loops and real-time question-handling mechanisms so staff and stakeholders can surface concerns earlier and see how their input shapes decisions.
- Continued to develop and refine the catalog of end-user training offerings and invited agencies to collaborate on targeted trainings to enable full value realization from the tools they use.

### *Enterprise Architecture*

Continued to mature the Enterprise Architecture program across business, data, applications, and technology domains, with the Technology Reference Model fully integrated into governance processes.

## Digital Infrastructure Executive Summary

*Initiative – Support for key initiatives throughout the organization.*

The Key initiatives the Digital Infrastructure staff are supporting are:

- SnowFlake – dedicated resources to test real-time log analysis functionality in a new platform that enables multiple technical teams to efficiently aide in troubleshooting, meeting compliance requirements, and alerting when critical systems need attention.
- Enterprise Platform Initiative – As we move into the next phase, the Enterprise Platform Initiative will progress toward demoing working software and continuing service mapping efforts. This work provides the foundational data and inputs that the Nova IT Operations instance will leverage to support IT Service Management (ITSM), IT Operations Management (ITOM), and IT Asset Management (ITAM) capabilities built on top of the platform.

*Project – State Building Projects*

SITSD Digital Infrastructure has assisted various agencies with remodeling efforts to maximize and update existing State space. SITSD Network Operations have managed, installed, conducted cabling, and coordinated circuit upgrades for various State projects. Each project as follows:

Finishing Phase

- Bozeman Marsh Labs

In Progress

- Capital
- Mitchell
- Metcalf
- Walt Sullivan
- FWP Havre

Planning Phase

- FWP Armory Lewistown
- FWP Helena, Custer Ave campus new construction

- DLI weights and Measures new building Helena

*Project – End of Life Hardware Replacements*

The Digital Infrastructure Office is proactively replacing outdated hardware across the State to ensure continued support for Agency area offices and critical systems. This initiative enhances system reliability and strengthens our security posture, aligning with our strategic objectives under the Zero Trust framework. This project work has already commenced and will continue for the majority of the biennium.

## Artificial Intelligence Executive Summary

### *Training and Enablement*

- Delivered 4 trainings covering AI safety, prompt engineering, and responsible use—supported by internal resources such as AI\_SkillUp and approved tool guidance in AI\_Tools.
- Enabled ~55 staff across agencies (MDT, MSL, DOR), infrastructure, applications, and program teams through guided meetings using approved tools (Perplexity Enterprise, Copilot, Claude/ChatGPT Business).
- Updated quick-reference guides and self-service materials in the CAIO SharePoint knowledge base.
- Hosted 2 AI Coffee Talks leveraging the series maintained in AI\_SkillUp.

### *Projects and Experiments*

- Advanced 6 AI experiments including ticket summarization, workflow, compliance, policy-draft summarization, knowledge lookup, and structured document tagging
- Implemented a lightweight experiment intake workflow incorporating risk checks and policy alignment reinforced through