



## DEPARTMENT OF ADMINISTRATION

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# ANNUAL PLAN OVERVIEW

## HB 190 Requirements

- Produce an annual plan no later than September 1, 2023, and every 2 years afterward.
- Annual plan must include the following components:
  - description of the function and divisions of the department;
  - initiatives of the department that reflect the benefits and outcomes;
  - specific and measurable performance measures for its initiatives, including the preferred outcomes and outputs with respect to each initiative.
- Performance measures must: be tracked on an ongoing basis; assess a departments' preferred outcomes and outputs; be quantitative when possible; and be designed to provide meaningful and useful information to policymakers and the public.
- Annual Performance Report
  - Produce an annual performance report for the fiscal year (no later than December 1, 2024 and no later than October 1 of each year afterward).



## Department of Administration Annual Plan

The department's focus is to provide essential enterprise services to State agencies enabling them to meet their missions and support the transformation and delivery of government services to benefit all Montanans.

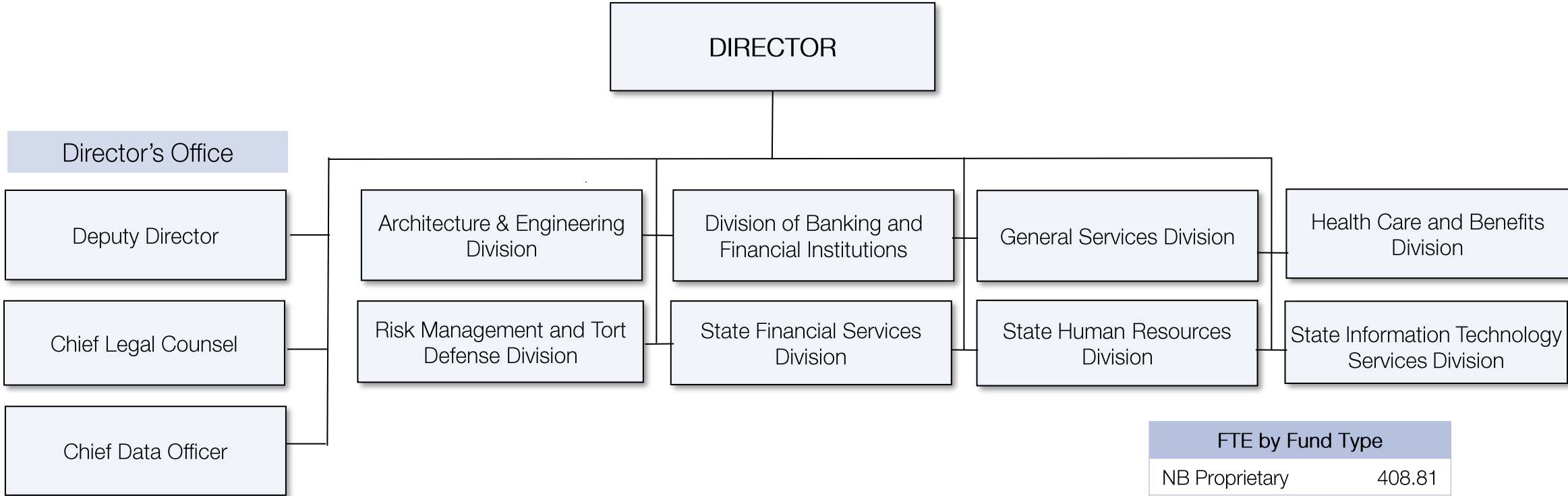
DOA's annual plan outlines eleven of our key initiatives planned in FY2024. Our annual plan can be found on our website and is updated annually. <https://doa.mt.gov/AboutUs/DOA-FY2024-Annual-Plan.pdf>

- Each initiative is stated in the form of a 'Strategic Outcome' and includes key measures.
- In some instances, initiatives are milestone driven as we are at the initial stages of standing up a new service or system. Upon implementation, ongoing key measures would be developed to monitor progress and make improvements, as required.
- The department also establishes an OGSM every 6 months which brings additional focus to the annual plan and other key initiatives.

*In addition, the department is required to produce the biennial State Information Technology Strategic Plan (2-17-523 MCA). <https://sitsd.mt.gov/Governance/IT-Plans/>*



# DEPARTMENT OF ADMINISTRATION



FTE by Fund Type	
NB Proprietary	408.81
HB 2	48.67
HB 2 SSR	54.00
Total	511.48
Modified FTE	37.58
Overall Total	549.06

A more detailed organizational chart has been provided.



# #1 IMPROVE MONTANAN’S ACCESS TO BROADBAND SERVICES

## Strategic Outcomes

The infrastructure and Investment Jobs Act (IIJA) provides unprecedented funding to close the digital divide in America, include \$42.45B under the Broadband Equity Access and Deployment (BEAD) Program.

On June 26, 2023, NTIA announced the BEAD allocations. The State of Montana has been allocated \$628 million under this federal program.

## Key Measures / Status

Meet 100% of critical milestones as required in FY2024 to secure Year 1 Digital Opportunity Funding by the end of the fiscal year.

Five Year Action Plan (FYAP) Due September 12, 2023	Completed
Complete All Outreach / Public Comment Requirements by November 2023	Completed
Initial Proposal (IP) Due December 27, 2023	Completed
Digital Opportunity Plan (DOP) Due January 14, 2023	On Track
Submit Digital Opportunity (DO) Capacity Grant Application to receive Year 1 or DO Grant funds from NTIA.	On Track



# #2 MODERNIZE HOW AND WHERE WORK IS DONE

## Strategic Outcomes

Continue implementation of the Remote and Office Workspace Study (ROWS) initiative to achieve the following:

- Reduce the State’s leased real estate through lease termination and consolidation.
- Reconfigure space (e.g., furniture, floorplans) to balance public-facing and administrative hubs and ultimately better serve the citizens of Montana.
- Modernize workspaces that are appealing, up-to-date, and fit the needs of workers and the public.

## Key Measures / Status

17% reduction in leased square footage resulting in an annual cost savings of \$1.4M at the conclusion of the project.	On Track
Address \$41.3M of deferred maintenance cost through renovation of 72% of the Capitol Complex square footage.	On Track

Activities Underway

- 39 Bureaus from 7 Agencies have moves planned for CY2024 (21 distinct moves planned)
- In the beginning phase of exiting leases as moves occur--one lease fully vacated saving \$73,200 annually.
- Contracts out for bid in preparation of renovating vacated space.



# #2 MODERNIZE HOW AND WHERE WORK IS DONE (continued)

## Where We Started | Key Objectives and Milestones

The Montana Remote Office and Workplace Study (ROWS) project goals were to address key challenges related to the workforce and workplace.

### 1 Enable and Optimize Telework

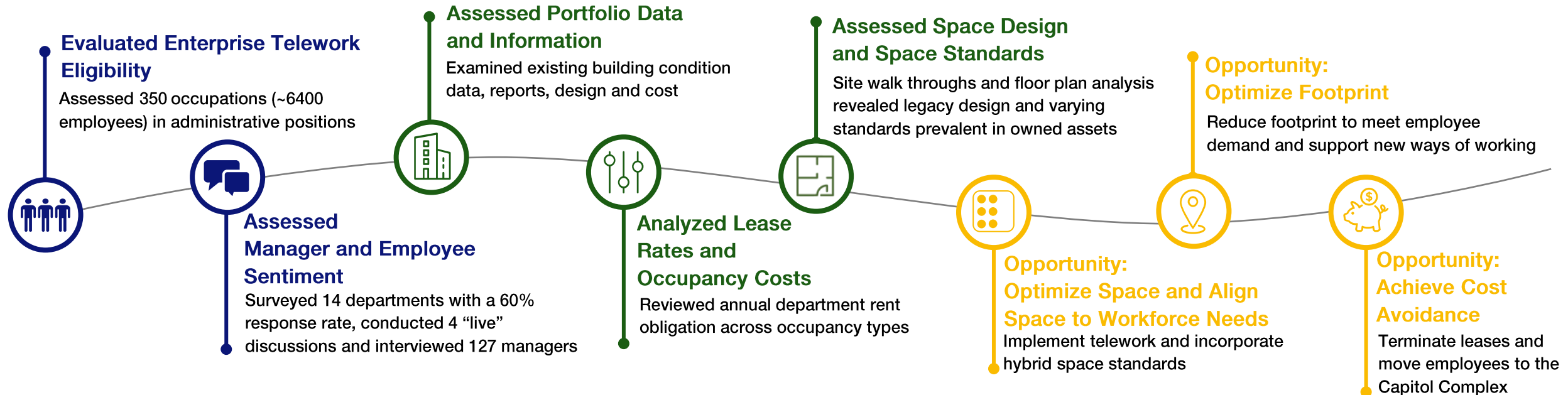
Assess telework eligibility, update policies, provide training materials, and communicate changes to the workforce

### 2 Enhance Operational Efficiency

Right size the portfolio and align space design to support the telework implementation

### 3 Develop and Action Plan for Implementation

Provide an actionable decision-making framework based on key opportunities



# #3 MODERNIZE WORKFORCE STRATEGIES

## Strategic Outcomes

**State Employee Pay:** finalize plan to modernize and align pay strategies across cabinet agencies. Initial phase includes implementation of an enterprise pay policy and updating processes to standardize pay practices.

**Training and Development:** implement new strategies associated with leadership/management development and acquire enterprise LinkedIn Learning licensing offering this platform to all employees.

**Talent Recruitment:** modernize recruitment practices to enhance the candidate experience driving interest in state government employment opportunities. Standardize internship program strategies across agencies to create a greater interest in student participation and strengthening our talent pipeline in targeted occupations.

## Key Measures / Status

80% of planned workforce initiatives implemented in FY2024	On Track
<p>The department has several initiatives underway to modernize our workforce processes and strategies. Examples of those implemented during the first half of the fiscal year:</p> <ul style="list-style-type: none"><li>• Implementation of one enterprise pay policy—eliminates agency specific pay plans.</li><li>• Standardization of recruitment practices to enhance the candidate experience.</li><li>• Implementation of new Employment Verification Process—provides a self-service approach to better support employees.</li></ul>	
Implement enterprise LinkedIn Learning online training by October 15, 2023. Create baseline metrics for measuring success to include participation trends.	Implementation Complete
<p>LinkedIn Learning was rollout out to all agencies in a staggered approach October 5–20.</p> <p><b>Beginning to monitor use – early data points:</b></p> <ul style="list-style-type: none"><li>• 348 courses have been completed (as of 11/22/23)</li><li>• Top 5 Course Topics: Microsoft Excel, Leadership, Interpersonal Communication, and Project Management</li></ul>	



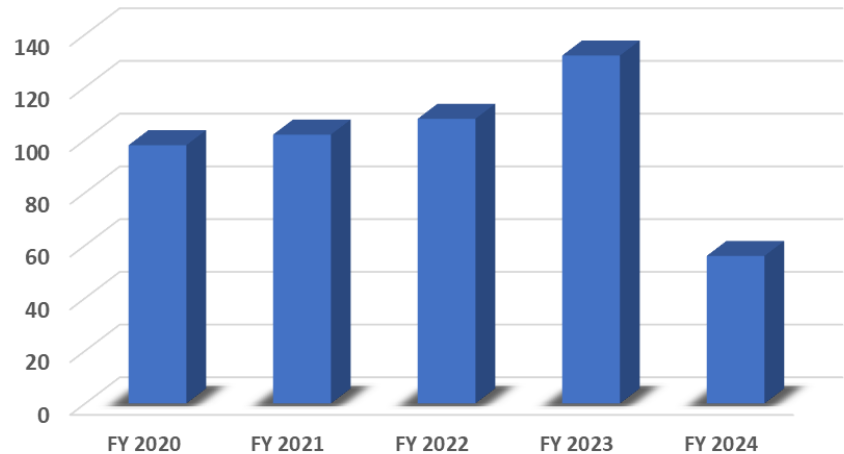
# #3 MODERNIZE WORKFORCE STRATEGIES (continued)

## Key Measures / Status

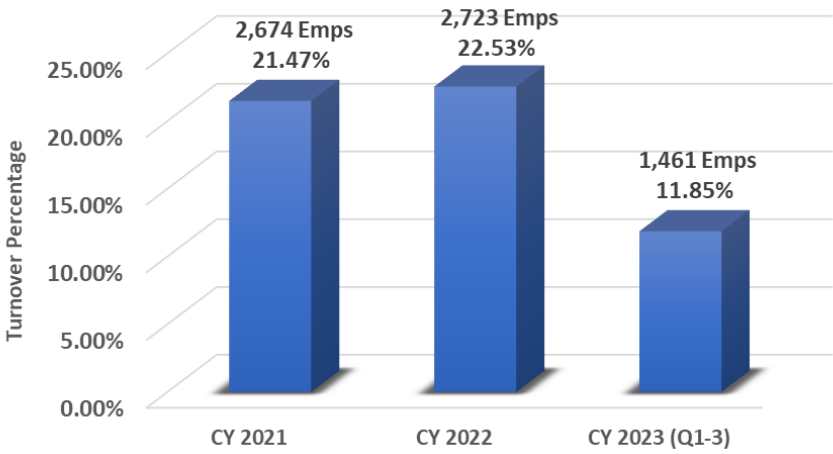
Implement enterprise internship program by December 31, 2023. Create baseline metrics for measuring success of the program to include number of interns hired.	On Track
The new program is intended to provide experiential learning opportunities for students while enabling agencies to proactively develop future talent to address current and future recruitment needs.	

Reduce voluntary turnover in cabinet agencies from 22.4% in CY2022 to 19.0% in CY2023.	On Track
Expect to meet goal of 19.0% turnover for the calendar year. Continue to implement workforce initiatives in an effort to attract and retain staff.	

# of Student Interns Hired  
by Fiscal Year



Enterprise Turnover  
by Calendar Year



# #4 DRIVE EFFICIENCIES IN FULFILLING PUBLIC RECORDS REQUESTS

## Strategic Outcomes


Drive implementation of the new centralized model associated with the Office of Public Information Requests (OPIR); ensure successful implementation of SB 232 and HB 580.

The new centralized model will:

- Establish common policies, standards, and procedures for handling public information requests.
- Provide a centralized intake and response to requests.
- Implement an enterprise system in support of this new centralized approach.

## Key Measures / Status

Establish an OPIR website for submission of public information requests by October 1, 2023.	Complete
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<https://opir.mt.gov>


Early startup of centralized intake process/website has resulted in 155 requests received since October 1.

### OPIR Central Intake Resource Center

Welcome to the OPIR Central Intake Center!


You can make a public information request to the agencies OPIR supports from the Make a Public Information Request page.

Before submitting a request, we encourage you to read the Frequently Asked Questions to find out which agencies we process public information requests for and how our process works.




#### What is OPIR?

Overview of the Office of Public Information Requests




#### Make a Public Information Request

Submit your public information request here




#### FAQs

Common questions about public information requests



#### Supported Agencies

List of OPIR-supported agencies



Established an enterprise-level Public Information Request Policy for agency adoption on October 1, 2023.

Begin required quarterly reporting July 1, 2024, as outlined in SB 580.	On Track
% of project milestones reached associated with the acquisition of new system.	RFP Issued



# #5 IMPLEMENT LONG-RANGE BUILDING PROGRAM

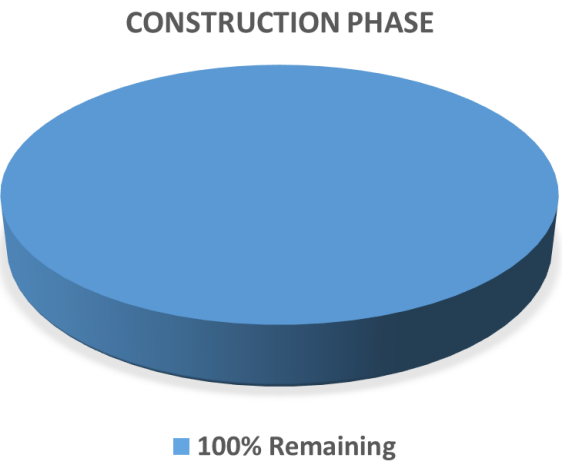
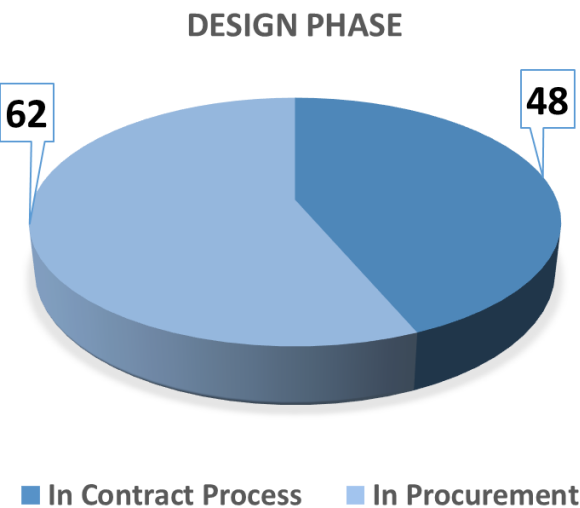
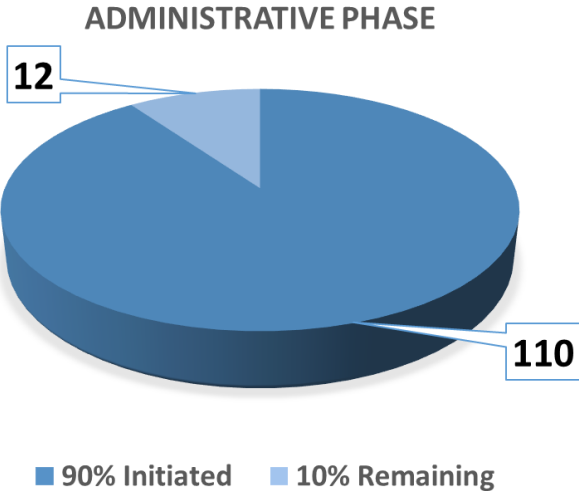
## Strategic Outcomes

Execute plan to deploy additional \$1.2B in HB 5, HB 817, and HB 872 funds for Long-Range Building Program projects appropriated during the 68<sup>th</sup> Legislative Session (a total of 122 projects).

## Key Measures / Status

### Current Status of 122 Projects

- Administrative Phase = # of project initiated
- Design Phase = # w/ executed design contracts
- Construction Phase = # of projects bid/awarded



# #6 EFFECTIVELY MANAGE INSURANCE PROGRAM COSTS

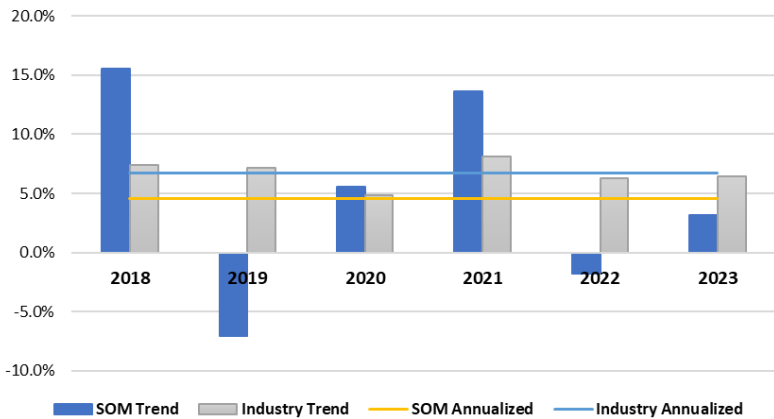
## Strategic Outcomes

Implement strategies in the areas of employee benefits, workers' compensation, and risk management (e.g., property, auto, general liability, and aviation) to effectively mitigate risk and result in costs savings where feasible.

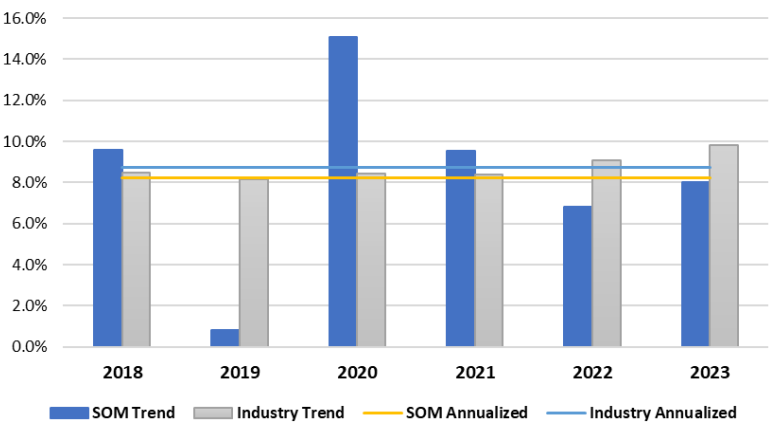
## Key Measures / Status

HCBD: Spend for medical, prescription, and dental claims at or below national trends.	On Track
HCBD: Manage contract with Medical Plan TPA and achieve specific multiple of Medicare reimbursements for professional providers and facilities.	On Track

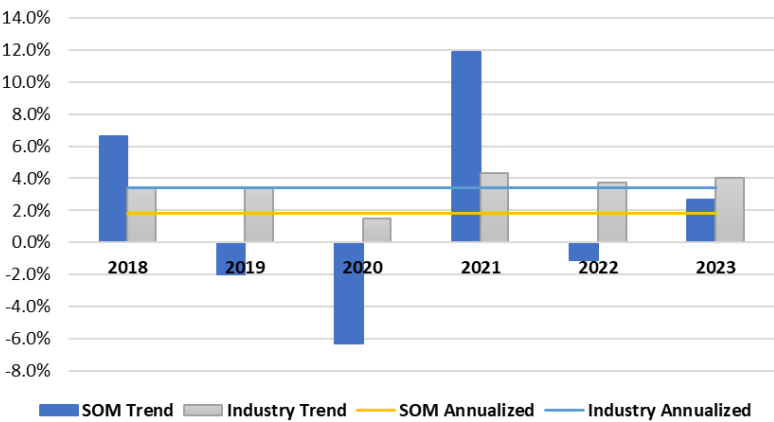
MEDICAL TRENDS



PRESCRIPTION DRUGS TRENDS



DENTAL TRENDS



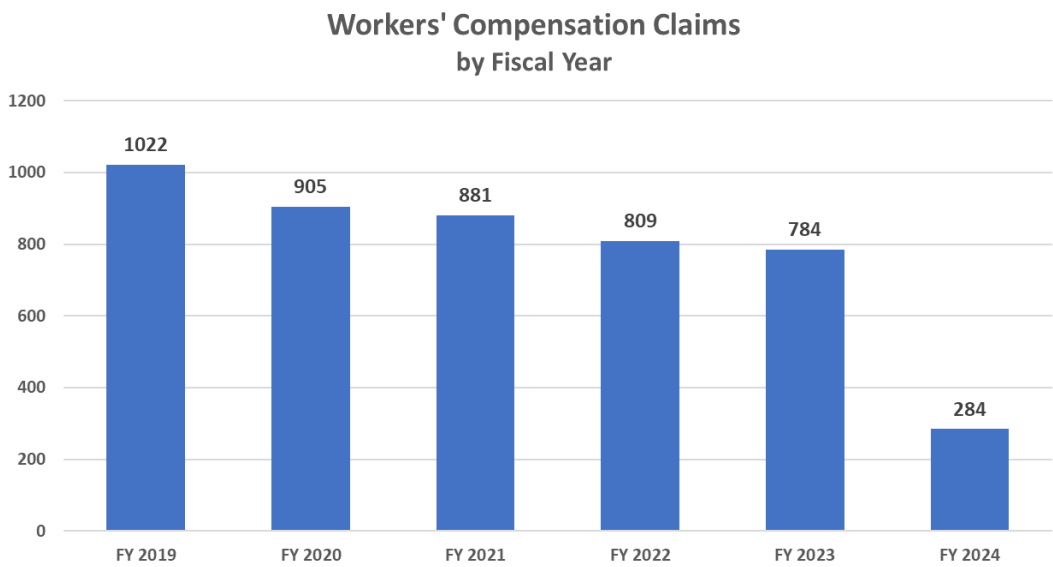
# #6 EFFECTIVELY MANAGE INSURANCE PROGRAM COSTS

## Key Measures / Status

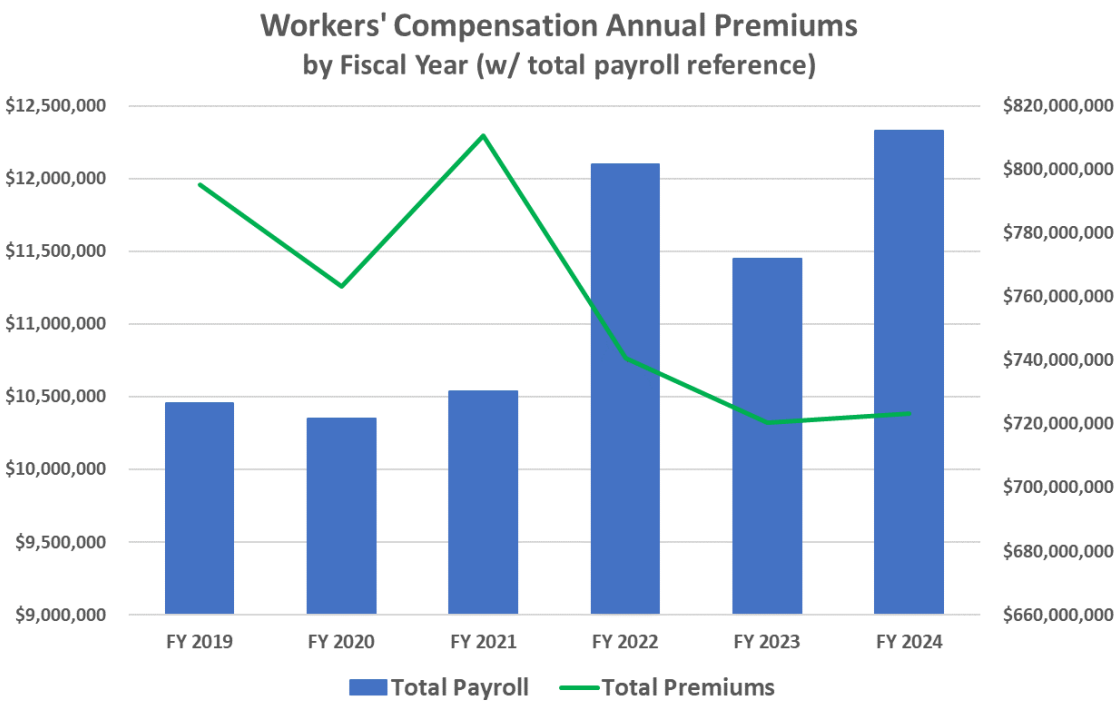
Experiencing a downward trend in both claims and premiums paid. The Workers' Compensation team continues to drive initiatives in partnership with agency leadership and agency safety officers to continue this trend.

HCBD: Reduce the # of employee workplace injuries & worker's compensation premium trends.

On Track



“Total Claims” reported represents total workers’ compensation claims reported by all State agencies. Claims include medical only, wage loss, and zero dollar claims.



“Total Premium” reported represents the total premium paid by State Government per fiscal year. FY2024 is estimated for both premiums and payroll.



# #6 EFFECTIVELY MANAGE INSURANCE PROGRAM COSTS (continued)

## Key Measures / Status

RMTD: Spend for auto, aviation, liability, and property insurance programs are at or below national averages.

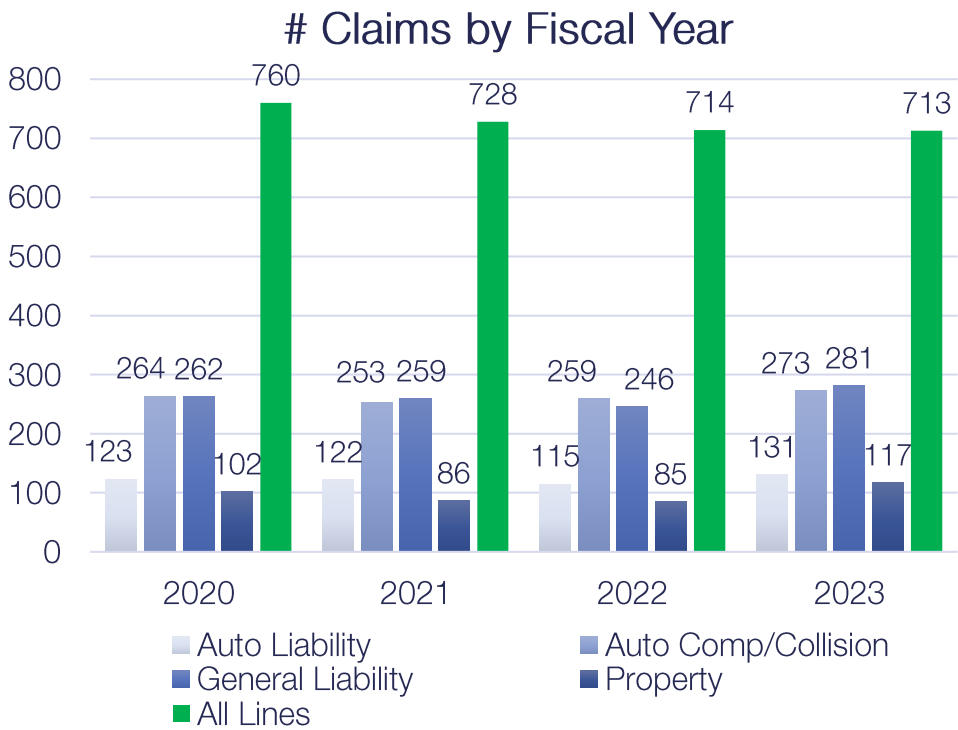
On Track

Unexpected revenues from Libby Asbestos recoveries exceed actuarial funding targets and necessitated an insurance premium holiday (no premium) for the 2025 biennium (table below).

PROPERTY/CASUALTY INSURANCE FUND FEE/RATE INFORMATION					
	FY 2023	FY 2024	FY 2024 \$ Change from FY 2023	FY 2025	FY 2025 \$ Change from FY 2023
Auto	\$1,820,313	\$0	(\$1,820,313)	\$0	(\$1,820,313)
Aviation	\$169,961	\$0	(\$169,961)	\$0	(\$169,961)
General Liability	\$14,613,042	\$0	(\$14,613,042)	\$0	(\$14,613,042)
Property	\$9,009,000	\$0	(\$9,009,000)	\$0	(\$9,009,000)
Total	\$25,612,316	\$0	(\$25,612,316)	\$0	(\$25,612,316)

RMTD: Number of auto, aviation, liability, and property claims trend by agency.

On Track & Stable



# #7 IMPROVE AND MODERNIZE THE STATE’S PROCUREMENT PROCESSES

## Strategic Outcomes

Ensure adherence to the Montana State Procurement Act across all agencies. Implement updated procurement processes and practices and ensure they are efficient, effective, and transparent.

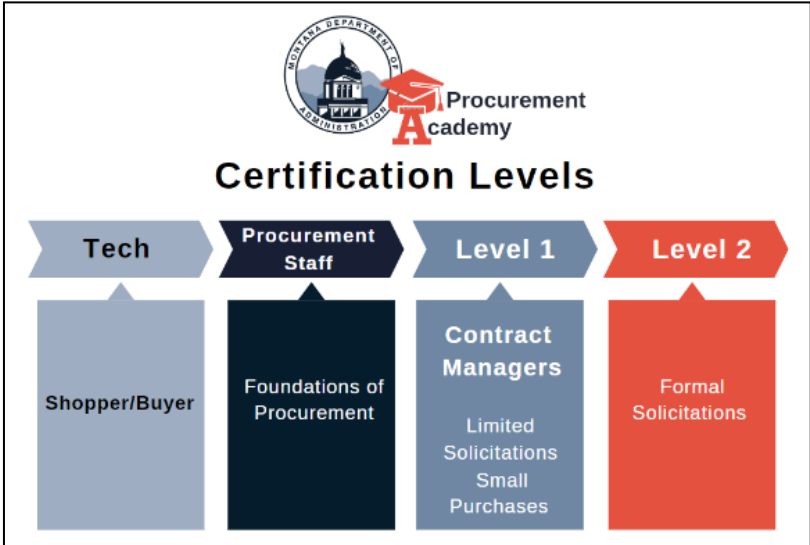
- Leverage strategic sourcing and contracting resulting in efficiencies and cost savings.
- Improve overall contract management.
- Enhance procurement skills and knowledge across the enterprise to drive consistency and compliance
- Provide opportunities for staff to develop skills and knowledge around procurement as part of a larger community of procurement professionals.

## Key Measures / Status

80% of milestones achieved as outlined in project plan during FY2024.	On Track
Notable achievements have been made in enhancing and modernizing enterprise-wide procurement work processes. Internally restructured the State Procurement Bureau in alignment with the new procurement services mission.	
100% of enterprise procurement staff trained.	On Track

Developed and recently deployed a comprehensive training program for all staff with procurement roles—total of 2,446.

Good progress with 20% of staff trained to date.



# #8 IMPROVE IT CUSTOMER SERVICE DELIVERY THROUGH INFORMATION TECHNOLOGY INFRASTRUCTURE (ITIL) BEST PRACTICES

## Strategic Outcomes

The need to refine our IT service management (ITSM) was defined through customer experience (CX) interviews with the agencies conducted in May/June 2023. These interviews illuminated areas where ITIL (Information Technology Infrastructure Library) processes in ServiceNow could be enhanced to better align with customer needs and expectations.

In response to the input, we are updating our implementation of these process to:

- Reduce response times.
- Improved first contact resolution.
- Lower the effort required to interact with IT by providing more streamlined services.

## Key Measures / Status

Complete initial evaluation for the current ITIL deployment by December 31, 2023.	On Track
The initial comprehensive assessment of the current ITIL setup by reviewing its effectiveness and identification of key areas for improvement is near completion.	
Baseline and start reporting on Customer Effort Score (CES) by October 1, 2023.	Complete
The baseline score is 1.67 out of 7, with 1 = very easy and 7 = very difficult. Plan to monitor and report this metric moving forward—making adjustments, as required.	
Increase Customer Satisfaction Score (CSAT) from 4.57 to above 4.7 by June 30, 2024.	On Track
Overall CSAT 4.62 (rolling 12 month). Last quarter = 4.59	



# #9 REDESIGN IT PROJECT & TECHNOLOGY APPROVAL PROCESS

## Strategic Outcomes

Redesign the approval process for approving digital infrastructure to eliminate duplication, ensure secure operations, and modernize technology.

Objectives of this initiative include:

- Improving collaboration with agencies to better foster inter-agency cooperations to ensure that technology selection aligns with organizational objectives.
- Improving metrics collection methods to provide data-drive insights to optimize decision-making.
- Improving identification and reduction of duplication, along with measure to minimize technical debt.

## Key Measures / Status

Implement Customer Effort Score (CES) surveys by December 31, 2023.	On Track
SITSD will begin to use a survey tool to track the customer effort score (CES) by December 31, 2023.	
Define and start reporting on Return on Investment (ROI) by June 30, 2024.	On Track
SITSD continues to work on the foundational elements for effective ROI reporting. Our focus includes collecting relevant data, developing metrics and key performance indicators to insure alignment with the State information technology strategy.	
Develop methodology for measuring and reporting technical debt by January 31, 2024.	On Track
SITSD is working to define the key components of technical debt to establish a standardized framework for its measurement. Our initial work is focused on the definition and categorization of technical debt.	



# #10 IMPROVE IT EFFICIENCY THROUGH CONSOLIDATING KEY ENTERPRISE FUNCTIONS

## Strategic Outcomes

Continue to drive efficiency in IT services/processes. Examples of these activities included, but are not limited to:

- Centralization of hardware purchase.
- Consolidation of IT services (e.g., service desk, security, etc.)
- Enterprise IT contracting.
- Enterprise workflow strategies.

## Key Measures / Status

Complete centralization of PC purchasing by December 31, 2023.	Complete
Enterprise PC contract is in place.	
Complete development of consolidation plan by March 31, 2024.	On Track
SITSD held a consolidation committee kick-off meeting in October. A committee charter, service level agreement, and statement of work are in development.	
Complete consolidation of security functions by June 30, 2024.	On Track
Fourteen security positions authorized by Legislature include information security officers (ISOs), security analyst, compliance officer, and supervisors. Efforts to hire have been successful--nine positions have been filled and three additional offers are pending.	



# #11 ENABLE DATA-DRIVEN DECISION-MAKING

## Strategic Outcomes

Led by the Chief Data Office (CDO), the Department will provide expertise and tools to:

- Drive the development and deployment of the enterprise data vision and strategies.
- Oversee data management, data analytics, and data governance.
- Ensure data quality.
- Recommend best practices in establishing agency performance measures.

The CDO office has created an onboarding roadmap and menu of services to support agencies in their data maturity journey. The specific outcomes of this initiative include:

- Improved customer service.
- Increased efficiencies.
- Enable transparency.
- Empowered agencies.
- Insight-driven decision-making.

## Key Measures / Status

Grow the State’s data lake footprint to 35 datasets. 37 datasets achieved—expect to be at 40 by end of the FY.	Ahead
Ingest data from 2 counties into the Justice Data Warehouse (SB 11).	On Track
Onboard 3 additional agencies to the Alation Data Catalogue.	On Track
Automate data sharing MOU process with ServiceNow / Add at least 5 active agreements. Automation Complete	On Track
Add at least 5 new agency data shares in Snowflake system.	On Track
Identify at least 3 key paper processes and digitize them in FY 2024. 2 Completed	On Track
Engage at least 2 key accounting software suppliers to provide more detailed local government data.	On Track
SFSD: Local government services bureau has engaged with two vendors to produce more detailed and understandable data from the State’s local government entities.	
Benchmark at least 2 states’ local government reporting strategies to draft a longer-term strategy for Montana. SFSD: To be completed in the 2 <sup>nd</sup> half of the FY.	On Track





**THANK YOU**