

2026-28 State IT Strategic Plan

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Strategic Foundation

Timeframe: Fiscal Year 2026 - Fiscal Year 2028

Vision

To drive the future of digital government in Montana with targeted innovation and dedicated public service, enhance the well-being of our citizens, empower agencies to efficiently achieve their goals, and streamline government operations.

Mission

Deliver unparalleled IT services to enable modern, innovative, secure, and accessible digital government experiences for Montana.

Strategic Themes

- **Digitization:** Promote standard, cloud-based digital tools and artificial intelligence to improve the efficiency of essential government services.
- **Reduce Technical Debt:** Retire antiquated custom systems and replace them with AI-built and AI-maintained solutions or cloud-based, COTS solutions to improve operational excellence, innovation, and cost efficiency.
- **Be Business Consultants:** Become trusted strategic business advisors by seamlessly aligning technical solutions with agency objectives.
- **Take Incremental Steps:** Pursue progress by focusing on needs and avoiding overly complex solutions.

Core Values

Ownership, Transparency, Trustworthiness, Innovation, Service, Teamwork

Strategy Map

The Montana IT strategy map provides a single, visual view of how our technology investments, internal processes, and organizational capabilities work together to improve experiences for citizens and employees. It aligns four key perspectives (citizen/partner, financial, internal process, and workforce capacity) and shows the cause-and-effect relationships between objectives at each level. Each level of the strategy map is supported by the objectives at the level below; all objectives ultimately serve the State of Montana’s citizens and partners.

Montana IT Strategy Map - Visual



Montana IT Strategy Map - Chart

Perspective	Objective ID	Objective	Supports / Relationship
Citizen / employee	1	Develop Trust by Measuring and Adapting Experiences	Related to the financial objective, "Maximize Return on Technology Investments"
Citizen / employee	2	Facilitate Great Experiences (Systems That are Adopted and Used)	Related to the financial objective, "Improve Vendor Management"

Financial	3	Maximize return on technology investments	Related to the citizen/employee objective, "Develop Trust by Measuring and Adapting Experiences"
Financial	4	Improve vendor management	Related to the citizen/employee objective, "Facilitate Great Experiences"
Internal process	5	Embed security stewardship across people, processes, and partners	Supports financial objectives, and supported by workforce capacity objectives
Internal process	6	Become product portfolio lifecycle management focused	Supports financial objectives, and supported by workforce capacity objectives
Internal process	7	Provide trusted and meaningful data	Supports financial objectives, and supported by workforce capacity objectives
Workforce capacity	8	Become a proactive partner	Supports internal process objectives
Workforce Capacity	9	Build a culture of ownership	Supports internal process objectives

Perspectives

The Balanced Scorecard approach to strategic planning organizes objectives into four key perspectives: Citizen/Partner, Financial, Internal Process, and Organizational Capacity. This section is organized by the four perspectives and includes descriptions of each strategic objective, the measures and targets used to track progress, and related initiatives.

Citizen/partner

The Citizen/Partner perspective centers on understanding and meeting the needs and expectations of customers or the public. It includes initiatives aimed at developing trust, adapting experiences to user needs, and facilitating experiences that ensure systems are adopted and used.

Objective: Develop Trust by Measuring & Adapting Experiences

This objective focuses on strengthening trust with citizens, partners, and employees by making service performance visible and using objective data to guide improvements. By consistently measuring how well systems perform and how reliably changes are delivered, the State can proactively identify issues, respond more quickly, and demonstrate that feedback leads to tangible action.

Measures and Targets

Measure	Target	Description
On-Time Change Deployment Rate	≥ 95% of changes deployed on or before deadline	Average calendar days from formal approval of a prioritized change request to validated deployment. Measured against the assigned completion deadline set at approval through standard governance.
Percentage of Systems with Active Performance Dashboards	100% of Tier 1 systems; 75% of Tier 2 systems	Count of state IT systems with live dashboards tracking usage, performance, and user satisfaction, divided by total managed systems by tier.

Initiative: System Performance Dashboard Program

Deploy live, standardized operational and user experience dashboards for all Tier 1 state IT systems, using a consistent toolset. Establish an adaptation workflow that incorporates feedback loops to address findings and inform system improvements.

Objective: Facilitate Great Experiences (Systems that are Adopted and Used)

This objective is centered on ensuring that state technology solutions are available and used effectively by the people they are designed to serve. By focusing on adoption and user experience, the State seeks to deliver systems that are intuitive, accessible, and aligned with real business and citizen needs.

Measures and Targets

Measure	Target	Description
System Adoption Rate	≥ 80% of intended users actively using the system	Active users (logged in within past 30 days) divided by total licensed/intended users, with the adoption

	within 90 days of completion of user onboarding and training	window starting from completion of user onboarding and training, tracked per system and reported at 90-day and 180-day intervals post-launch
User Experience (UX) Satisfaction Score	≥ 4.0 out of 5.0	Average score from standardized post-interaction or periodic user satisfaction surveys administered across state IT systems

Initiative: *User Experience (UX) Design Standards and Review Process*

Develop statewide UX design standards and require UX review gates for all new and substantially updated state systems. Include accessibility compliance (ADA/Section 508) as a core standard to ensure systems are usable by all citizens.

Initiative: *Change Management and Adoption Support Program*

Expand the formal organizational change management and technology adoption support service that partners with agencies during system launches. The result will be higher user adoption rates through targeted training, communication, and early engagement, ultimately ensuring smoother transitions and increased utilization of new systems.

Financial

Financial stewardship focuses on the effective and responsible management of financial resources within the State. It includes initiatives to rationalize and align the IT portfolio, reduce procurement duplication, and effectively manage vendors.

Objective: Maximize Return on Technology Investments

This objective focuses on using portfolio-level insights to ensure IT funding is directed toward the highest-value systems and services. By rationalizing redundant and end of life systems, standardizing procurement review, and routing new requests through a portfolio alignment gate, the State can lower long term operating costs while freeing resources for modernization, cybersecurity, and citizen-facing improvements.

Measures and Targets

Measure	Target	Description
IT Portfolio Rationalization Rate	5% of baseline systems retired, consolidated, or migrated annually	Calculated as number of systems retired, consolidated, or migrated divided by the baseline system count in the enterprise IT Portfolio Data Foundation.
Number of IT Systems Rationalized	10 systems retired, consolidated, or migrated annually	Tracked by counting the number of systems retired, consolidated, or migrated each fiscal year against the baseline system count in the Enterprise IT Portfolio Data Foundation.
Procurement Duplication Redirect Rate	50% of flagged duplicate procurement requests redirected to an existing solution or consolidated procurement	Tracked via procurement intake records; a request is considered flagged when the portfolio alignment gate identifies functional overlap with an existing system or shared service.
Portfolio Alignment Gate Coverage	100% of new procurement requests routed through the alignment gate	Tracked via procurement intake records; calculated as count of requests evaluated by the portfolio alignment gate divided by total procurement requests submitted.

Initiative: *Technology Investment Portfolio Review and Rationalization*

Conduct a comprehensive audit of all current state IT investments across agencies to identify redundant systems, underutilized licenses, and consolidation opportunities. Deliverables include an investment inventory dashboard, a tiered portfolio classification (invest/maintain/retire), and a prioritized rationalization roadmap.

Initiative: *IT Procurement Duplication Review and Portfolio Alignment Gate*

Develop an AI-driven alignment review stage within Montana's existing IT procurement request process that checks every new technology request against the Enterprise IT Portfolio Data Foundation. Requests that duplicate existing capabilities are flagged for redirection to the appropriate existing solution, shared service, or consolidated procurement track. Flagged duplicates will be reviewed to determine if a redirect is appropriate; some duplication is necessary to meet agency-specific needs. Deliverables include an AI duplication screening criteria framework, integration of the portfolio alignment check into

the procurement intake workflow, and a cross-agency visibility mechanism to identify and consolidate similar requests from different agencies.

Objective: Improve Vendor Management

This objective is centered on treating major technology vendors as actively managed strategic partners rather than passive suppliers, aligning contract outcomes with business needs, and addressing service issues earlier. Consistent vendor management data will also improve forecasting, renewals, and negotiations, helping SITSD demonstrate that ongoing contract spend is actively monitored and optimized on behalf of Montana taxpayers.

Measures and Targets

Measure	Target	Description
Number of Vendors Under Active Performance Management	100% of Tier 1 and 50% of Tier 2 vendors	Count of vendors with documented performance scorecards and scheduled review cadences, segmented by spend tier

Initiative: Vendor Management Program Launch

Establish a vendor management team that will coordinate with procurement, legal, security, and portfolio management teams to ensure contracts, renewals, and projects are aligned with statewide standards and the Enterprise IT Portfolio Data Foundation. Deliverables include vendor tiering criteria, standard performance scorecards, a quarterly vendor review cadence, and a single view of vendor performance.

Internal Process

Internal Processes involves optimizing and streamlining the State’s internal operations to enhance efficiency, productivity, and quality. It encompasses initiatives related to lifecycle management, product roadmap development, updated development standards, and the creation of the Enterprise IT Portfolio Data Foundation.

Objective: Become Product/Portfolio Lifecycle Management Focused

This objective is about shifting Montana IT from project-by-project delivery to a product- and portfolio-mindset, where systems are actively managed throughout their full lifecycle. By assigning product owners, defining lifecycle stages, and maintaining forward looking roadmaps, the State can make clearer decisions about when to invest, maintain, or retire systems and ensure that changes are timed with budget cycles and agency business priorities.

Measures and Targets

Measure	Target	Description
Percentage of Systems with Defined Product Owner and Roadmap	80% of Tier 1 and Tier 2 systems	Systems with an assigned product owner and a documented 12-month roadmap divided by total Tier 1 and Tier 2 systems

Initiative: *Product/Portfolio Lifecycle Management Model Implementation*

Establish a standardized, Montana-specific product and portfolio lifecycle management model to guide the planning, delivery, operation, and retirement of the state’s IT systems. The model will define clear lifecycle stages, governance gates, decision criteria, and expectations for how systems move between stages, ensuring that technology decisions are intentional, repeatable, and aligned with strategy and budget cycles. Deliverables will include lifecycle stage definitions, governance gates, product owner role requirements, and roadmap templates.

Initiative: *Statewide IT Product Roadmap Program*

Develop and maintain a statewide IT product roadmap that provides a unified, forward-looking view of Montana's IT systems. The roadmap, in conjunction with the Enterprise IT Portfolio Data Foundation, will align technology decisions with state-wide and agency-level priorities and budget cycles.

Deliverables include a governance framework for the roadmap, a product owner assignment matrix, a roadmap template and taxonomy, an agency input process, and an accessible roadmap view for agency directors and other stakeholders.

Objective: Modernize Software Development with AI

This objective focuses on incorporating AI-assisted tools and practices into the software development lifecycle to increase delivery speed, quality, and consistency. By assuming AI assistance as the default for in house development, updating standards to recognize AI authored code, and defining clear review and security expectations, Montana IT can increase developer throughput while maintaining strong oversight and auditability. This modernized approach supports faster implementation of legislative and agency priorities and reduces backlog.

Measures and Targets

Measure	Target	Description
AI Tool Adoption Rate	≥ 90% within 18 months	Percent of state developers actively using approved AI coding assistants monthly, measured via tool license telemetry and IDE plugin usage logs.
Developer Throughput Uplift	≥ 30% by end of FY29	Percent change compared to fiscal year 2026 baseline in features or story points shipped per developer-month for in-house development teams, measured against a to be established baseline.

Initiative: *AI-First SDLC Standards*

Refresh the state's software development standards, code review gates, and security review process to assume AI-assisted authorship as the default for in-house development. Deliverables include updated coding standards that recognize AI-generated and AI-assisted code, revised code review checklists, prompt and model attribution practices, security review guidance for AI-authored code, and an approved tools list.

Objective: *Provide Trusted and Meaningful Data*

This objective centers on building and sustaining a single, authoritative data foundation that decision makers can rely on. By assigning data stewards, standardizing metadata, and integrating inventory information into dashboards, the State ensures that leaders, project sponsors, and oversight bodies share a common view of what IT assets exist, how they are used, and where risks and opportunities lie. This trusted data layer underpins lifecycle governance, security management, vendor oversight, and financial reporting, turning portfolio information into a strategic asset rather than a one time inventory effort.

Measures and Targets

Measure	Target	Description
Portfolio Data Stewardship Coverage Rate	100% of Tier 1 and Tier 2 systems with an assigned data steward	Tracked via portfolio management system role assignments.
IT Portfolio Inventory Completeness Rate	100% of known IT assets and applications with complete metadata records	Measured by comparing inventoried assets against discovery tool findings and agency-reported systems; gaps flagged for remediation; reported quarterly to CIO

Initiative: *Enterprise IT Portfolio Data Foundation*

Establish and maintain a single, authoritative source of truth for Montana's executive branch IT portfolio. This initiative creates the data foundation that powers every other strategic objective on the scorecard. Deliverables include an IT asset and application inventory, a standardized data taxonomy and classification schema, integration with the BSC reporting dashboard, defined data stewardship roles, data update cadences, and a governance policy ensuring inventory accuracy is maintained as a standing operational obligation.

Objective: Embed Security Stewardship Across People, Processes, and Partners

This objective emphasizes that cybersecurity is a shared responsibility that must be integrated into everyday behavior, procedures, and third-party relationships. By monitoring training completion, vulnerability remediation timelines, and vendor security posture, Montana IT can demonstrate due diligence in protecting citizen data and critical systems while meeting statutory risk management requirements.

Measures and Targets

Measure	Target	Description
Cybersecurity Training Completion Rate	99% Percent of state IT staff	Tracked via LMS or training platform enrollment and completion records; reported quarterly
Average Time to Remediate Critical Security Vulnerabilities	Critical Patches within 7 Business Days	Using current enterprise security tools, calculate the average number of calendar days between the identification of a known, exploitable vulnerability and remediation.

Initiative: *Third-Party and Vendor Security Risk Assessment Program*

Develop and operationalize a structured security risk assessment process for all IT vendors, managed service providers, and intergovernmental partners. Deliverables include a vendor risk tier classification model, standardized security questionnaires, contractual security requirement language for procurement templates, and an annual reassessment schedule.

Initiative: *Security Stewardship Metrics and Reporting Dashboard*

Build an executive-facing security performance dashboard that aggregates KPIs across people, processes, and partner dimensions. Deliverables might include a defined KPI library, a reporting tool integrated with existing IT data sources, and quarterly CIO briefing reports. The dashboard will support transparent accountability consistent with the State IT Strategic Plan's performance measurement principles.

Organizational Capacity

The organizational capacity perspective emphasizes the State's investment in employees and the organization's culture. It includes initiatives to create a culture of accountability, structure the organization to enable cross-functional collaboration, and deliver consistent service.

Objective: Become a Proactive Partner

This objective focuses on deepening relationships with agencies so that IT is engaged early as a strategic advisor rather than solely as an operational service provider. A proactive partnership builds trust, reduces surprises during sessions and budget development, and ensures that IT investments reflect shared priorities rather than isolated requests.

Measures and Targets

Measure	Target	Description
Agency Relationship Health Score	≥ 4.0	Measured via quarterly agency satisfaction survey administered by Customer Success Managers.
Proactive Engagement Cadence	100% of assigned agencies with on-schedule quarterly business reviews	Tracked via Customer Success Manager engagement records; calculated as count of agencies with a documented QBR completed within the scheduled quarter divided by total assigned agencies.

Initiative: Office of Agency Experience Launch

Establish the Office of Agency Experience as the unified service delivery starting point for all executive branch IT engagement. The Office brings together IT supervisors, Customer Success Managers (CSMs), and a unified help desk under a single organizational structure designed to deliver consistent, relationship-driven IT service. Each agency is assigned dedicated relationship managers who own the agency relationship, understand their mission priorities, anticipate technology needs, and coordinate Montana IT resources on their behalf.

Objective: Build a Culture of Ownership

This objective is to reinforce end to end accountability for service outcomes, ensuring issues are owned, communicated, and resolved without unnecessary hand offs. By adopting a single owner model for incidents and requests and supporting a matrixed operating structure, the State encourages staff to take responsibility for results while drawing on expertise across teams. This culture of ownership improves agency confidence, reduces friction in service delivery, and supports the broader strategic aim of operating as one Montana IT organization serving all partners.

Measures and Targets

Measure	Target	Description
Issue Resolution Without Ownership Transfer Rate	85% of tickets resolved by the originally assigned owner	Tracked via help desk ticketing system by comparing intake owner to resolving owner at ticket closure and tracking all ownership transfers during the resolution process.

Cross-Team Collaboration Index	≥ 3 cross-functional initiatives active per quarter	Number of active projects or working groups with participation from three or more organizational units, tracked in the project portfolio system
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Initiative: *Own the Call — End-to-End Issue Ownership Program*

Establish an owner model for all IT service requests and incidents, with one team member accountable for each issue from initial contact through resolution. Anchored in the Service Desk, each issue owner serves as the employee-facing point of contact, coordinates cross-team involvement, proactively communicates status, and ensures no issue falls through the cracks. The single-owner model defines explicit accountability and responsibility through ownership protocols that address authority gaps, owner selection criteria at intake, and escalation paths when resolution stalls. Deliverables include ownership protocols, escalation playbooks, cross-team engagement standards, and staff recognition for ownership behaviors.

Initiative: *Matrixed Operating Model Implementation*

Complete, implement, and adapt a matrixed organizational structure for executive branch IT that enables staff to contribute specialized expertise across multiple teams and initiatives simultaneously, without siloed reporting constraints to create a flexible, cross-functional workforce where ownership is shared, expertise flows to where it is needed, and no single team becomes a bottleneck. Deliverables include an approved operating model document, an agency communication and transition plan, role clarity guides for matrixed staff, and a governance structure that supports cross-team engagement at scale.