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To:        Agency Directors and Agency GIS Professionals

From:      David Ewer, Budget Director

Date:      May 23, 2011

Re:        GIS Task Force May 18, 2011 Recommendation


At the request of the Governor's Office of Budgeting and Program Planning in December of 2010, a GIS State Task Force was formed to assess and recommend changes to ensure the most effective and efficient funding and governance of GIS within state government. This task force, consisting of a cross section of GIS stakeholders, has developed a set of recommendations which at this point primarily address more effective governance of GIS.

The Office of Budget and Program Planning supports the recommendation of the GIS task force while recognizing that this is the first step in a multi-tiered process. The GIS task force should continue to meet to develop additional recommendations that more specifically address statewide infrastructure and potential efficiencies that may exist through shared resources.

I have attached the May 18, 2011 recommendation of the GIS Task Force and support the Montana State Library and the Department of Administration's State Information Technology Services Division working together to implement this organizational transition.

**Montana GIS Task Force - May 18, 2011 Recommendations**

The Governor's Office of Budgeting and Program Planning requested a committee comprised of State Agency staff and local government representatives to assess and recommend changes to the GIS functions in Montana. The committee was charged with assessing the current GIS environment and developing recommendations to improve the service and find efficiencies to better deliver existing services. A subcommittee was formed to complete a set of recommendations to meet this goal. The subcommittee developed a Project charter and the excerpt below describes in detail the focus of the subcommittee

*The objective of this project is to assess and recommend improvements to the organizational structure associated with the various GIS business units in the state. Further, the committee will recommend key activities and initiatives that need to be accomplished to move GIS forward in Montana*

- *The development of GIS for Montana, at the agency and central level, has occurred opportunistically rather than with a planned approach. As a result of that development, differing views as to who and how it gets done at times hampered Montana's GIS development*

- *Montana continues to have two state agencies both with centralized GIS services; this may confuse customers or duplicate resources and services.*

- *Significant focus has occurred on GIS planning but many of the actions and expected outcomes of these plans have not been realized.*

- *GIS is often expensive. Funding and staffing needs have been identified but adequate resources have not materialized, nor has a clear and transparent funding strategy been developed.*

- *Shared infrastructure has been developed but not fully utilized for various reasons.*

- *Disparate GIS strategies exist between state agencies. Undesired results of this are the creation of independent, non-integrated systems with dissimilar architecture and redundant data and cost inefficiencies*

- *Customers are not fully identified, nor their needs and requirements*

*The GIS State Task Force was formalized by a directive from the Governor's Budget Office in December 2010, charging the Information Technology Managers Council to look at statewide GIS services. A cross-agency subcommittee has been formed from a larger group of agency representatives to develop a set of recommendations. These recommendations will focus on the equitable and efficient administration of GIS services for the State of Montana. Actions of the Task Force will include developing recommendations for a centralized organizational structure, as well as a set of strategic goals to help guide the GIS practitioners in Montana.*

1. *Assess and recommend organizational changes within MSL and SITSD programs that would improve the efficiencies of GIS in Montana.*

2. *Develop clear goals and expectations for how GIS services and data will be made available to all customers, both publicly and at all levels of government.*

3.  *Develop recommendations to ensure statewide GIS network Architecture is developed in a cost effective and affordable manner.*

*Sub-Committee Members:*

- *Mike Bousliman (chair) - MDT*
- *Nat Carter - DEQ*
- *Shawn Graham - OBPP*
- *Janet Hess-Herbert - FWP*
- *Art Pembroke - Local Government Representative*
- *Jennie Stapp - MSL*
- *Robin Trenbeath - SITSD*

The subcommittee focused our attention on the functions served by Department of Administration/State Information Technology Services Division (SITSD) and the Montana State Library (MSL).  Further, there were two key areas where the subcommittee did not fully agree; the oversight of the Montana Land information Advisory Council (MLIAC) and the lead role for the Montana Spatial Data Infrastructure (MSDI).

**To resolve these challenges the subcommittee's recommendations are as follows;**

- Align GIS functions in Montana with the center of excellence model outlined in the Governor's State Strategic Plan for IT.  This GIS center of excellence would reside within the Montana State Library.
- Move the oversight of the MSDI to the MSL.   This will centralize the GIS data services and resolve a longstanding challenge of having this function being served by two organization units.
- Move the staff and funding currently assigned to support the BSMC organizationally to the MSL, continue to fund through the MLIAC grant funding and continue to provide support for BSMC.  This will help centralize the GIS services in one organization unit. This would be accomplished with an Administrative Appropriation Budget Change Document and an MOU in the 2013 biennium with permanent statutory changes to follow in the 2013 session.
- MSL would assume duties currently assigned to the Department of Administration related to cadastral data in 76-6-212(3), MCA.
- Utilize the existing statutory flexibility to share in the oversight of the MLIAC.   The MLIAC is currently chaired by the GIO and the statute allows for the chair of that group to be another member of the committee.  The committee members are appointed by the governor and the requirements for those appointees are also in statute.   The GIO

would still be part of the committee, the chairperson could be a MSL staff designated by the Director of D of A, or another member of the committee. Staffing to support the MLIAC would come from MSL. Leadership of the Advisory Council would be provided by the Chair of the council with support from all committee members.

- Future statute changes to 90-1-401 and 76-6-212(3), MCA, to remove references to the Department of Administration and insert references to the Montana State Library.
- The technical administration of MSDI in Montana would be the responsibility of MSL. SITSD would assume a traditional IT application hosting role for use by MSDI and state agencies' business GIS. SITSD and MSL would develop an MOU to ensure these two entities work closely together to move GIS forward. The MOU needs to address how these two functions work together to better serve the GIS customers across the state. These customers include State agency staff, Local, Tribal, and Federal government entities and the general public.
- Enterprise License Agreement: MSL would manage the contract.
- MSL is encouraged to complete a comprehensive plan that includes a date by which they will move to the SMDC (likely co-locate).

**Benefits of changes:**

- Centralize the GIS service in one organization unit. The core service provided by the MSL is a logical unit to deliver GIS information and provide the long-term vision for the information needed to better service customers. SITSD primary focus in regard to GIS is from a technical perspective. This recommendation continues to involve SITSD from a technical perspective, but allows the MSL to be the primary organization unit to deliver the GIS content.

**Focus of the GIO:**

Technical Architecture, strategic focus on how to support the technical vision and direction for GIS information established by MSL, State Agencies and the MLIAC as it is related to SITSD's obligations under MITA. Serves as SITSD technical expert to support the GIS services in Montana, develops the vision and strategy for GIS from a MITA perspective. Represents SITSD in all technical aspects related to GIS.

The matrix below lays out the roles and responsibilities of each entity. There are several areas where both SITSD and MSL are designated as the Primary. In those areas, the focus of SITSD as the Primary is on the technical aspects of that particular activity and the MSL's roles is focused on content. The subcommittee recognizes certain functions must be served in a primary nature by both entities and this was a way to resolve that issue. Several functions such as the GIS vision, strategic planning and coordination with locals is central to both the service SITSD and MSL provides. The technical versus content role is further defined as follows:

Technical:

Focus is on the information technology aspects, providing the necessary architecture, infrastructure, and software to serve GIS applications.  Provide the vision for the GIS Technical Architecture.

Content:

Focus is on the information, data, and the services the library provides to its customers.

| Role/Responsibility | MSL: | GIO/SITSD: | Other |
|---|---|---|---|
| MSDI Oversight/Coordination | Primary | Advisory | MLIAC: Advisory<br>MAGIP: Advisory<br>GIS Mgs Forum: Advisory |
| MSDI data content management | Primary | Advisory | MLIAC: Advisory<br>MAGIP: Advisory<br>GIS Mgs Forum: Advisory |
| MLIAC staffing | Exclusive | | |
| MLIA Land Plan | Primary | Advisory | MLIAC: Advisory<br>MAGIP: Advisory |
| MLIAC Grant Process Coordination * | Primary | Advisory | MLIAC: Advisory |
| GIS Strategic Planning | Primary | Primary | MLIAC: Advisory<br>MAGIP: Advisory<br>GIS Mgs Forum: Advisory<br>MACO: Advisory |
| Policy and Standards Development under MITA ** | Advisory | Primary | MLIAC: Advisory<br>MAGIP: |

| | | | Advisory |
| --- | --- | --- | --- |
| | | | GIS Mgs Forum: Advisory |
| GIS Funding Recommendations to the Governor and/or Legislature | Primary | Advisory | MLIAC: Advisory<br>MAGIP: Advisory<br>MACO: Advisory |
| GIS Advisor to Governor, DOA Director, and State CIO | Advisory | Primary | MLIAC: Advisory |
| GIS coordination with Tribal, Federal, State and local governments the public and private sector | Primary | Primary | MLIAC: Advisory<br>MAGIP: Advisory<br>GIS Mgs Forum: Advisory<br>MACO: Advisory |
| GIS Legislative Leadership | Primary | Primary | MLIAC: Advisory<br>MAGIP: Advisory<br>GIS Mgs Forum: Advisory<br>MACO: Advisory |
| MSDI GIS Infrastructure Administration | Primary | Advisory | GIS Mgs Forum: Advisory<br>MLIAC: Advisory |
| State Agencies' Business GIS Infrastructure Administration *** | Advisory | Primary | GIS Mgs Forum: Advisory<br>MLIAC: Advisory |
| State Enterprise & SSITSD GIS Procurement**** | Advisory | Primary | GIS Mgs Forum: Advisory<br>MLIAC: Advisory |
| ELA Contracting, Administration & Negotiation ***** | Primary | Advisory | GIS Mgs Forum: Advisory<br>ELA Mgs Group: Advisory |
| Coordinate with various policy & advisory groups | Primary | Primary | MLIAC: Advisory<br>MAGIP: Advisory<br>MACO: Advisory |

| GIS Marketing ****** | Primary | Primary | MLIAC:  Primary |
| | | | MAGIP:  Primary |
| GIS Outreach | Primary | Primary | MLIAC:  Primary |
| | | | MAGIP:  Primary |
| Final Arbitrator | Advisory | Advisory | Governor's Office |

\* MSL has a Grants Coordinator on staff.  This position could potentially be tasked with some of the Grant coordination responsibilities.

\*\* SITSD has existing policy staff.   These staff could potentially be tasked with much of the responsibilities related to drafting policies with input from the GIS Community.

\*\*\* *SITSD will continue to offer Geo-database hosting for the reminder of FY12/13. SITSD reserves the right to discontinue or substantially modify the service offering starting in FY14.*

\*\*\*\* SITSD has existing staff with expertise in enterprise architectures.  These staff assisted the GIO during the drafting of the Cloud RFI and could potentially be leveraged for future needs.

\*\*\*\*\* SITSD has existing staff that administer enterprise agreements. These staff could potentially be tasked with much of the ELA coordination responsibilities.  However it may be more economical and efficient over the next biennium for the BMSC Chief to continue to administer the ELA from the technical side (estimated 4 hours per month).

\*\*\*\*\*\* MSL has a Marketing and Communications Coordinator on staff.  This position could potentially be tasked with some GIS marketing responsibilities.