



3 Vision

This Enterprise Technology Strategic Plan(ETSP) was developed through a global partnership, commencing with concurrence from the IT Policy Advisory Committee (IPAC) with key internal Department of Technology Services (DTS) staff and external support services, following an industry standard strategic planning model. The DTS team was responsible for shaping the enterprise theming model and identifying/validating the departmental and common IT direction, principles, goals and objectives as a part of the countywide partnership.

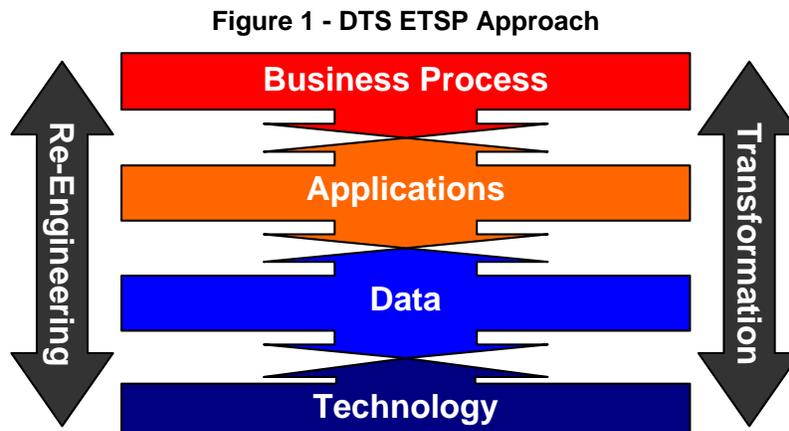
DTS began by assessing the current state of IT within Montgomery County Government (MCG). This assessment will continue to be validated through an ongoing, established methodology that includes data collection, analysis and discussions with key MCG and DTS stakeholders. These steps are an important part of the development, planning and validation process to facilitate the assessment of the current state of IT requirements, perceptions, applications and provider organizations.

Key input to the plan includes the following:

- Presentation and feedback from IPAC on the concept of the Enterprise Technology Strategy plan
- Initial interviews with County Department Directors and Leaders
- Group interviews with Directors and DTS staff as a part of the theming construct
- Workshops with DTS management and program management staff

- Montgomery County Council Objectives
- FY 2006–2008 Montgomery County DTS Technology Strategic Plan
- DTS-specific documentation

The following figure depicts a nationally recognized strategic planning approach, which places an emphasis on business-driven planning for technology decision making at an enterprise level.



This plan builds upon the successes and strengths of MCG in deploying and utilizing technology in support of its operations. The ETSP also builds on the accomplishments and current strategies MCG has made in exploiting IT to further the objectives of providing services to its local businesses and citizens, notably:

- **Alignment of business objectives and direction for DTS**
There is an emerging governance structure that includes participation from business leaders and managers in the early phases of the IT investment life cycle. There is high-level sponsorship and involvement from the business for transformational technology initiatives (e.g., Enterprise Systems, project and program processes, organization alignment supporting technology partnership).
- **Execution of various initiatives aimed at improving the overall planning and management of technology**
DTS established a major initiative steering committee inclusive of technology leadership input, in concurrence with the development of an ETSP that articulates a unified and clear mission, vision and objectives. The ETSP also bonds the options for attaining those objectives, and sets the road map for attaining them. DTS established an enterprise Project Management Office (PMO) as an enabler to address business needs and provide necessary tools and processes to manage projects efficiently and effectively. As well DTS leveraged outsourcing.
- **Dedicated departmental technology staff**
Many of the larger departments within the County have staff that support existing technology solutions. Most departmental teams have alliances with DTS and

support standards, processes and rules that support a consistent approach to technology selection, delivery and support.

- **Dedicated DTS staff**

Many DTS personnel have long tenure and have comprehensive understanding of the business, mission and processes of MCG.

- **Use of technologies to transform the business**

The plan for the implementation of an Enterprise Resource Planning (ERP) solution as well as a consolidated call center Constituent Relationship Management (CRM) have illustrated a willingness to change existing business processes and adopt best practices. MCG has consistently shown its desire to be a leader in proactive approaches as a government.

- **Effective establishment of a information security program**

Re-organizing and alignment of information security, emergency operations and Disaster Recovery/Continuity of Operations Plan (DR/COOP) to be inclusive of DTS; conducting ongoing self-evaluations of security status through internal and third-party audits, resulting in highly secure IT services .

- Enhancing business performance on more sophisticated technology service offerings.

- Initial efforts at standardizing on current platforms and applications.

- Consolidation of systems and servers to support green initiatives, reduce support costs and maximize enterprise benefits.

The ETSP also highlights MCG and DTS' specific IT capabilities, including areas that present opportunities for improvement. During the assessment, DTS staff observed these areas for enhancement or escalation:

- **IT Governance**

Montgomery County needs to adopt a formal IT governance process. With the exception of IT projects that are selected through the Annual IT Review process, many smaller efforts are selected and implemented on an informal basis, such as expensed or non-capitalized projects. There is the IT CIO Approval request and prioritization process, a component of the overall DTS support process which requires departments through a project evaluation, but only if there are dependencies on the core IT support or infrastructure. In this process, IT initiatives are vetted based on strategic value, technical risk and return on investment (ROI). This, in concert with future plans for consolidated enterprise project management and tracking, should facilitate better management and delivery of IT project benefits.

- **Knowledge Management**

Montgomery County needs to adopt a formal IT knowledge management program to ensure that institutional and technical knowledge exists in a central repository that is accessible to all who require access to it and limits loss of institutional knowledge.

While DTS has implemented the Self Help Information Portal (SHIP) its base for knowledge collection is currently limited to IT user based help information. A more robust Knowledge Management initiative will comprise business/technology recordation and further support the historical roadmap for technology innovation and current state.

- **Business Intelligence**

MCG has performance reports generated by multiple systems and methodologies; however, it lacks a formal County-wide data warehouse with business intelligence derived from multiple business units. This effort is anticipated following the development of the ERP solution.

- **Enterprise Architecture**

MCG has made significant progress in architecture development in individual areas (i.e., application architecture and infrastructure, security, network, data center operations); however, there is a growing need for a comprehensive business Automation Framework (or Enterprise Architecture -EA) that integrates business, information and technology. DTS has defined technology standards through internal architecture governance. Improvements would include the establishment of an enterprise Architectural Governance Council (AGC). The AGC, which would include business functional members, would be responsible for developing standards. The architects (business and technology) attend sessions to present topics or to escalate issues that cannot be resolved within a specific project. This is the process for approving standards and for approving exceptions.

- **Adoption of an Integrated Information Technology Strategy**

MCG, as enterprise solutions are implemented, will need to have an integrated enterprise information strategy, including:

- Information standards and principles
- Access to MCG-wide information assets (i.e., MCG-wide search)
- Distribution mechanisms
- Operational Governance (i.e. expansion of “policy” to operational support guidance)

- **Application Environment**

MCG’s current application environment is a diverse assortment of platforms and applications due to the complexity and historical legacy of running a governmental operation. However, DTS has performed an application portfolio analysis to evaluate the applications based on technology, mission alignment and business value to identify targets for migration or integration or replacement based on current and future requirements. This effort will continue to receive emphasis as near term enterprise solutions through the Tech Mod programs will have a significant impact on the incorporation, management and retirement of this significant assortment of systems.

- **Information Security**

MCG has re-organized information security under the Office of the Chief Information Officer to allow for direct and independent focus on security issues. The County’s

information security policies are continually refreshed to identify and classify information (i.e., PCI, HIPAA, sensitive but unclassified, and public) based on security levels in order to design rules for systems and allocate resources accordingly.

- **DTS Staffing Plan**

DTS must formalize a long-term staffing plan which identifies required staff skill “competencies” and defines roles and responsibilities required to deliver defined IT products and services. The results will use these competencies to drive the hiring process and source selection processes (which will include strategic thinking on internal hiring as well as outsourced provisions). This staffing plan should also be used to support imperatives and priorities for technology knowledge base development as well as roadmaps for employee positional succession planning.

- **Communications Strategy**

DTS provides communication and outreach to its stakeholders through various mechanisms and in multiple formats. DTS, however, does not have dedicated staff to perform this function, with the exception of Outreach services in the Cable Office. A defined communication strategy is key to the ongoing education of DTS technology staff as well as County leaders, departmental partners and senior leadership on technical innovations, risks and consequences of actions for implementations or delays in addressing technology viability.

- **IT Infrastructure Environment**

DTS currently maintains a focus on technology consolidation and optimization. In an effort to validate flexibility, adaptability and position in the marketplace, DTS should conduct an independent benchmarking study on its distributed computing, server infrastructure, datacenter, Local Area Network/Wide Area Network (LAN/WAN) and Help Desk to assess requirements, current technologies being used, and the processes serving the user base. This information should be compared against industry best practices to identify opportunities for consolidation and harmonization.

- **DTS Disaster Recovery/Continuity of Operations**

DTS follows a disaster recovery plan that provides for recovery at an off-site location. However, funding has been approved for the planning and development of a comprehensive Continuity of Operations (COOP) plan that will provide a more accurate focus on disaster recovery objectives and expectations. Disaster recovery and COOP training needs to be provided to all business and IT staff to validate expectations in the support and identification of mission critical systems.

In addition to these strategic operational initiatives, MCG recognizes that there are IT improvement opportunities in the following areas:

- Public Safety Communications / Interoperability
- Health and Human Services Technology Modernization
- Integrated Financial Management
- Resident Customer Services/Satisfaction

- Records Management
- Fixed and Movable Asset Management
- Human Capital Management

In short, MCG will, as part of the enterprise investment opportunities, invest in these initiatives in order to improve the technology environment, especially where technology can reduce cost and/or directly improve services. This effort will have several benefits.

- Better positioning for the strategic direction of the County Executive
- A better-managed IT environment that is stable, standardized and easier to support
- A lower total cost of ownership for the IT environment
- Better utilization of IT investment dollars through standards and infrastructure improvements
- Better access to information and proven technologies that allow end users to be more productive in their current assignments, which frees up resources for other priorities
- Increased end-user satisfaction
- Provide a path for technology innovation that limits the risks for such efforts and investments.

For MCG to realize these benefits, it is imperative that the County embrace change and enact a more structured and highly collaborative approach to managing its technology resources. Once the prioritization of the recommended initiatives has been made, the County will be positioned to ascertain quantitative benefits.

DTS has taken the most important step in managing its IT investment by recognizing the importance of a continued focus on technology at the enterprise level. This step, the creation of the Enterprise Technology Strategic Plan, was an effort that required cooperation from County leadership and the end-user community. The results of this cooperation will continue to be positive and establish recognition for DTS as the “center of excellence” for technology standards, delivery and management. To sustain the positive momentum from this initiative, the County must now continue its push for change and begin to embrace the momentum of the plan.

Clearly, all the recommendations of a strategic plan of this magnitude cannot and should not be executed at once. Fully approved projects with a short-term implementation schedules should continue to be funded and results posted for County leadership.

A full adoption and implementation of this plan will create an environment wherein technology investments and services will enable the enterprise to better achieve its mission. It also provides a consistent direction for DTS to achieve its IT services and support mission as stated at the beginning of the plan.

Figure 2 - Technology Support Organization

