

## 2019 Tribal IT Benchmark Survey & 2019-2020 Survey Plan

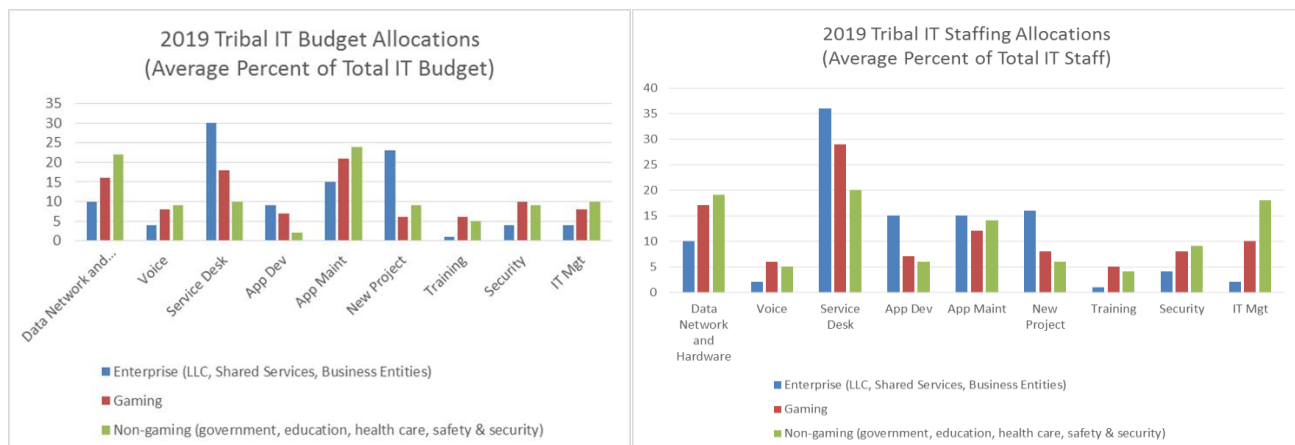
### *2019 Spending & Staffing Assessment Findings & Recommendations*

In February 2019, TribalHub in partnership with SITE by Gartner Inc. launched an annual IT benchmarking survey. Many participants provided inputs to the survey and we thank each of you for your contributions to build the body of knowledge for Tribal Organization's IT metrics and benchmarks. The 2019 survey took a high level look at IT spending and allocations for IT Service Desk, Applications, Infrastructure and Security. The survey was open to all TribalHub members and TribalNet attendees February through April 2019.

#### Findings

1. Director of IT or IT Director is the most common title for the senior IT person. The title Chief Information Officer was used only by Gaming and Enterprise participants.
2. 53% of CIO/IT Directors report to the Chief Executive Officer or equivalent, and the remaining responses were split between the Chief Financial, Operations, or Administrative Officers.
3. 9,500 is the average number of Service Desk tickets per year across all responses.
4. 30 full-time IT staff is the average across all responses.
5. Digital business is the top business priority for Enterprise IT (LLC, Shared Svs).
6. Growth/Market Share and business area consolidations are the top business priorities for Gaming IT.
7. Business area consolidation and innovation are the top priorities for Non-Gaming IT.
8. Legacy system modernization and attracting/retaining IT talent are priorities for IT Leaders.

Tribal IT spending and staffing can vary greatly depending on the scope of services, maturity of processes and technology, and ability to attract and retain the IT workforce. IT Organizations are key business partners for modernizing and transforming Tribal organizations and capital projects can have a short and long term budget impact for IT baseline costing models. The following two survey charts from respondents demonstrate the perspectives from different Tribal IT Organizations.



#### **CIOs/IT Directors looking to mature their approach to managing IT finance, risk and value should:**

- Achieve business objectives and strategic advantage by selecting and applying the appropriate type of benchmarking.
- Drive where the organization should be spending by using benchmarking insights to inform investment decisions.

- Achieve the organization's digital ambitions by using benchmarking as a competitive process to identify and socialize the required level of IT investment.

## Benchmarking Types and Benefits

| Cost Benchmarking   | Price Benchmarking   | Price Validation/<br>Contract Reviews   |
|---|--|---|
| <ul style="list-style-type: none"> <li>▪ Cost baseline</li> <li>▪ Cost insights and areas for attention</li> <li>▪ Cost optimization</li> </ul> | <ul style="list-style-type: none"> <li>▪ Sourcing strategy</li> <li>▪ Market testing</li> <li>▪ Cost optimization</li> <li>▪ Strategic insights and advantage</li> </ul> | <ul style="list-style-type: none"> <li>▪ Specific market price testing/validation</li> <li>▪ Cost optimization</li> </ul> |

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### Sample of Research and Toolkits available on Benchmarking for Gartner Members:

IT Key Metrics Data 2019: Surveys: This document provides insight into how IT organizations can participate in IT Key Metrics Data research, data quality processes, as well as data capture channels such as the ITBudget interactive comparison tool, IT Key Metrics Data studies, and Gartner Consulting led prescriptive benchmarks.

IT Key Metrics Data 2019: Index of Published Documents and Metrics: The Gartner IT Key Metrics Data (ITKMD) research series contains more than 3,000 IT investment, cost, staff and performance metrics covering 5 topic areas and 90 documents. This document provides a comprehensive list of all documents and metrics published in the series and contains direct links to each.

Toolkit: How to Present Your IT Budget to the Board of Directors: Often, a CIO's best opportunity to discuss IT cost and the contribution IT is delivering to the enterprise comes during the annual financial planning process. This Toolkit contains a "board-ready" sample IT budget presentation that focuses both on cost and value

Toolkit: Gartner's Top 100 IT Cost Optimization Ideas: CIOs often ask for a comprehensive list of ideas, techniques or opportunities for optimizing IT costs. This Toolkit was developed to assist CIOs in cost optimization idea generation and execution. CIOs should combine this list of ideas with their own internal list of priorities.

Key Concepts in IT Financial Management: Budgeting, Funding, Transparency and Allocation: CIOs often ask for a comprehensive list of ideas, techniques or opportunities for optimizing IT costs. This Toolkit was developed to assist CIOs in cost optimization idea generation and execution. CIOs should combine this list of ideas with their own internal list of priorities.

Toolkit: The Gartner Cost Value Matrix, 2018: A Framework to Measure IT Efficiency and Business Value: This research expands on key concepts within IT financial management: budgeting, funding, transparency and allocation. CIOs should review these concepts and use the recommendations to increase the maturity of their IT financial management practices to produce better outcomes for the enterprise.

IT Cost Optimization Should Be an Ongoing Discipline: Many organizations attempt to optimize IT costs, but industry leaders treat cost optimization as an ongoing discipline, rather than a one-time exercise. CIOs who handle IT cost optimization as a reactive, one-time action fail to maximize cost optimization activities and opportunities.

How CIOs Can Work Effectively With CFOs to Optimize Cost: To successfully fund innovation and digital business initiatives, CIOs should partner with CFOs to optimize enterprise IT and business costs. CIOs must first demonstrate they have effectively managed IT costs, and then partner with CFOs to leverage technology to optimize cost across the enterprise.

Three-Year Roadmap for IT Cost Optimization: CIOs are often under continuing pressure to cut costs or deliver more with fewer resources. CIOs can use the concept of this roadmap as a communication device to socialize and gain buy-in from enterprise partners for evolving the enterprise's IT cost optimization initiatives.

Gartner's Top Cost Optimization Techniques: An IT Perspective: When operating costs must be reduced, CIOs evaluate spending and cost drivers. C-suite executives are most concerned about costs in their own budgets, so leverage these 10 techniques to identify cost optimization opportunities across multiple organizational budgets.

Win at Cost Optimization With Nine Critical Success Factors and Their Metrics: Many CIOs lead cost optimization programs that focus only on tactical IT cost reduction goals that may not even reduce business cost at all. Use and customize these critical success factors to improve success rates and add legitimacy, methodology and structure to your program.

Run IT as a Business Using Six Pillars of IT Financial Transparency to Drive Value: Gartner's Six Pillars of IT Financial Transparency extend beyond the traditional focus of IT budgeting, thus enabling CIOs to run IT as a business by providing the financial transparency needed to optimize cost and value.

### **Sampling of Subject Matter Experts available to Gartner members**

#### **Jim McGittigan**

Mr. McGittigan is a Research Vice President within the Gartner CIO Research group, where he focuses on delivering value to Gartner clients through his insight and experience in IT financial management. This includes cost transparency, budgeting, chargeback, service pricing, cost optimization, benchmarking, project financial management and performance metrics. Prior to joining Gartner, Mr. McGittigan led IT finance functions for five Fortune 500 companies over the past 15 years, ensuring that the funding available for technology spending was effectively managed.

**Years of Experience:** 8 years in total with Gartner, 23 years in IT industry, 32 years in Banking, Finance and, Insurance industry, 9 years in Media industry

**Professional Background:** Fiserv, VP, IT CFO, 1 years; Electronic Arts, Director, Global IT Planning & Analysis, 2 years; SunTrust Bank, FVP, IT Finance CFO (Application Delivery), 4 years



**Industry Expertise:** Primary Industry: Banking, Finance and Insurance | Expertise Level: Contributor -Subsectors: Banking; Secondary Industry 1: Media | Expertise Level: Native - Subsectors: Media & Publishing

**Education:** B.S., Quantitative Methods and Finance, Louisiana State University

**Top 5 Issues I Help Clients Address:** Give experience-based insight into IT financial management issues; Best practices in IT budgeting, forecasting and reporting; Cost transparency via IT chargebacks, allocations and service costing; How to successfully implement and track IT project financials; Effective use of IT benchmarking to manage costs

### Eric Stegman

Eric Stegman is research director with Gartner's Consulting Services based in the United States. Prior to joining Gartner, Mr. Stegman spent eight years in key positions with Sikorsky Aircraft, where he developed, implemented and managed a distributed-computing environment for all quality assurance operations. He was also responsible for quality and productivity improvement projects, staffing plans, financial management and implementation of the ISO 9001 quality standard.

**Years of Experience:** 24 years in total with Gartner, 33 years in IT industry

**Professional Background:** United Technologies/Sikorsky Aircraft Corporation, Senior Engineer, 9 years

**Education:** Mr. Stegman earned a bachelor's degree from the State University of New York at Buffalo and a master's degree in business administration from New York University.

### James Anderson

James Michael Anderson is CIO Research Director in IT Finance, Economics, Value and Risk Team. His coverage includes all aspects of IT Financial Management & IT Cost Optimization, IT Mergers and Acquisitions and Digital Business KPIs. Mr. Anderson is an accomplished Information Technology Finance Executive responsible for IT budget planning, communicating IT Business value, cost allocation models, PMO, PPM and associated IT governance processes.

**Years of Experience:** 2 years in total with Gartner, 24 years in IT industry, 17 years in Healthcare industry, 5 years in Banking, Finance and Insurance industry, 3 years in Energy & Utilities industry

**Professional Background:** J.P. Morgan, Executive Director, IT Business Management, 2 years; Pfizer, Director, IT Project Portfolio & Operations, 15 years; AIG, VP, Global PMO, Program & Project Management, 1 years

**Industry Expertise;** Primary Industry: Healthcare | Expertise Level: Master-Subsectors: Pharmaceuticals Secondary Industry 1: Banking, Finance and Insurance | Expertise Level: Specialist; Secondary Industry 2: Energy & Utilities | Expertise Level: Native

**Education;** M.B.A., Finance, Sacred Heart University; M.S., Information Technology Management, Sacred Heart University; Certified PMP

### Stewart Buchanan

Stewart Buchanan is a Research VP in Gartner's CIO team, focusing on the economics of digital technologies in the enterprise. Mr. Buchanan has expertise in both supply and demand management through specializations that include IT asset management and gathering data to support the life cycle chargeback of digital technology costs. As an IT strategy consultant, Mr. Buchanan helped many well-known organizations to measure, plan, purchase, recharge and improve value-for-money in information services, working across industries as diverse as financial services, media, manufacturing and retail. He previously spent 15 years in IT service management working as an IT manager for an international firm and as a technical service manager, both in distribution at a national reseller.



**Years of Experience:** 13 years in total with Gartner, 32 years in IT industry, 8 years in Media industry, 7 years in Services industry, 7 years in Banking, Finance and Insurance industry, 7 years in Retail industry

**Professional Background:** GlassHouse Technologies, Strategic Analyst, 6 years

**Industry Expertise:** Primary Industry: Media | Expertise Level: Native - Subsectors: Media & Publishing; Secondary Industry 1: Services | Expertise Level: Native - Subsectors: Miscellaneous Services Secondary Industry 2: Banking, Finance and Insurance | Expertise Level: Native- Subsectors: Miscellaneous Financial Secondary Industry 3: Retail | Expertise Level: Native - Subsectors: Retailers

**Education:** B.A., with honors, Intellectual History, Universities of Sussex and Burgundy

### Sampling of Tribal Executive Partner Bio's available to Gartner members

#### Izella Dornell

Izella Dornell is an Executive Partner with the Gartner Executive Programs America Service Delivery team. Ms. Dornell works closely with several of our Tribal clients including government, gaming & hospitality, and enterprises. Prior to joining Gartner, Ms. Dornell was the Deputy Chief Information Officer for the U.S. Department of Commerce (DOC), where she led the oversight and program management for the department's \$2.5 billion IT investment portfolio. She was responsible for leading the department's 21st century technology implementation in support of the headquarters building renovation project. Ms. Dornell also delivered the IT framework for the establishment of the department's shared-service model designed to maximize efficiencies and cost savings for technology solutions and delivery. She was recognized for outstanding IT portfolio management and proven results across the department and among her peers in the federal government. Ms. Dornell also had a 30-plus-year career at NASA (Houston and Washington, DC), where she held several senior leadership roles in support of the Human Spaceflight programs. Ms. Dornell led the agency's transition of the Space Shuttle's annual \$3 billion infrastructure/assets at the end of the program and was part of the senior management that established the Exploration Systems Mission organization at NASA Headquarters in response to the Space Exploration Vision's Executive Order from the President of the United States.

**Years of Experience:** 3 years Tribal with Gartner, 13 years in IT industry

**Professional Background:** Department of Commerce, Deputy Chief Information Officer, 6 years, National Aeronautics and Space Administration, Space Shuttle Program Control Manager, 35 years

**Industry Awards/Accolades:** Exceptional Service Medal – NASA, Bronze Medal Award – DOC, Governor of Texas Outstanding Leadership Award, Federal Women's Excellence in Leadership Award, Acquisition Excellence Award, Who's Who in Business Executives

**Education:** M.B.A., University of Houston, B.S., Math and Physics, Tennessee State University, Nashville, Harvard Executive Management Program, Simmons College Executive Development for Female Managers

## Robert Brese

Robert (Bob) Brese is an Executive Partner with the Gartner Executive Programs America Service Delivery team. Mr. Brese has been working with tribes for the last several years. Prior to joining Gartner, Mr. Brese was the Chief Information Officer for the U.S. Department of Energy (DOE) where he led the strategic application of information technology and the management of cybersecurity risk in accomplishing the Department's goals in scientific discovery, applied energy and nuclear security. He was responsible for overseeing more than \$1.4 billion of annual spend across 17 national laboratories and more than 30 other sites in 26 states. Mr. Brese is a recognized leader and expert in government policy and the fostering of public-private partnerships. Mr. Brese's federal government career also included service as DOE's Deputy CIO, as the Deputy CIO for DOE's National Nuclear Security Administration and as the Director of Security Program Performance Evaluation for DOE's physical nuclear security program. Mr. Brese also had a 22-year career in the U.S. Navy as a submarine officer and sailed in every major sea and ocean, including under the polar ice cap, during eight major deployments and countless shorter operations. Ashore, he was an innovation leader, deploying the first shipboard LAN on the USS Frank Cable, implementing COTS processing and iterative software development for sonar acoustic data processing, and laying the business process foundation for enterprise resource planning in support of major acquisition programs. As Executive Officer of the U.S. Submarine Base in Groton, Connecticut, he led over 2,500 military and civilian personnel in support of over 70 organizations and nearly 25,000 military and civilian personnel, family members and retirees.

**Years of Experience:** 5 years in tribal with Gartner, 18 years in IT industry

**Professional Background:** U.S. Department of Energy, CIO and Deputy CIO, 8 years, U.S. Navy, Submarine Officer, 22 years

**Industry Awards/Accolades:** Federal 100 Award Winner, Government Technology Research Association Vanguard Award

**Education:** B.S., civil engineering, Vanderbilt University, Nashville, Tennessee, M.S., engineering management, The Catholic University of America, Washington, D.C., Federal CIO Certificate, National Defense University, Washington, D.C.

## David Goldberg

Mr. Goldberg serve as trusted advisor to client CIO's and senior IT executives from Global 1000 organizations, Tribal Nations & Enterprises and government agencies. Mr. Goldberg engages each client to help identify their key projects critical to achieving their specific enterprise and organizational goals. By clearly capturing and understanding their needs I am able to empower their vision by focusing on advising & coaching, critiquing strategies and guiding development and execution of their strategy.

As the VP of Technology and Collaboration systems for Guthy-Renker he was responsible for leading and managing the overall global Technology, Collaboration and Cloud strategy for Guthy-





Renker. This is accomplished by defining and implementing the overall strategic direction for infrastructure and operations as well as daily management of Guthy-Renker's strategic cloud computing outsourcing vendors, virtualization, storage, servers, operating systems, application environments, WAN/LAN data networking, Information Security, PCI Compliance, and operational processes. In addition, we created an environment where Guthy-Renker is the Collaboration Tools & Innovation Leaders to drive leading edge efficiency, technology use, and empowering employees to collaborate and innovate faster and easier. Implement and manage an ITIL Service Desk supporting all global customers and defining and upholding appropriate SLAs and response times.

**Years of Experience:** 2 years in tribal with Gartner, 27 years in IT industry

**Education:** Master's in IT Operations, Washington University, St Louis, Missouri, Masters in Aeronautical Operations, Embry-Riddle Aeronautical University, Bachelors in Computer Science/Classics, University of Colorado, Boulder, Colorado

### **Gartner Executive Program Members receive:**

- Access to Benchmarking Toolkits and access to 2,238 total toolkits & metrics
- Unlimited access to 2,200+ of the highest skilled, most experienced Subject Matter Experts in the industry with 43 who are focused on Benchmarking
- The insight, collaboration and mentorship of an Executive Partner with decades of CIO level experience and tribal experience
- Peer Connect & Peer Insights (tribal and global)
- Onsite Strategy or Workshop Session with Subject Matter Expert and/or Executive Partner
- Unlimited Service Delivery Team support-an extension of your team
- Leadership Development Curriculum
- Exclusive Executive Program Attendance to the largest gathering of CIO's in the world, Gartner's Symposium/XPO
- Exclusive access to CIO Forum

### **2019-2020 Tribal Survey Plan**

We will be generating 5 tribal surveys in the fall of 2019. The surveys will be distributed and collected at the Annual TribalNet Conference and amongst all Gartner Tribal members. Results will be available in two formats. The first format is for the public and will be available on SITE. The second deliverable will be for Gartner members and TribalHub members.

1. CIO/IT Directors
2. Health Directors/Managers
3. Government Directors/Managers
4. Gaming & Hospitality Directors/Managers
5. Enterprise Directors/Managers

**For more information on partnering with Gartner contact:**

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