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Overview

Purpose

Government agencies are weathering a digital explosion: greater and greater amounts of information are being stored and transmitted electronically, but the digital infrastructure powering these operations is straining under the weight. The pressure has exposed gaps in business processes, leadership strategy, and recruitment efforts, reinforcing the idea that digital transformation is not entirely understood, supported, or directed as it should be. With limited budgets, agencies are forced to choose between equally critical priorities in order to protect their data, expand mission potential, and prepare workforce needs for the future.

Do they have what they need to succeed?

To answer this question and understand more about the challenges agencies face in their digital transformation journey, Government Business Council (GBC) conducted an in-depth research study of federal, state, and local government employees.

Research Methodology

In April 2019, GBC and KPMG released a survey exploring perceptions of digital transformation efforts in federal, state, and local governments. 388 employees responded, representing over 28 federal agencies and many more state and local agencies across the nation. 56% of federal respondents hold positions at the GS/GM-13 level or above (including Senior Executive Service). Respondents hold a variety of job functions, with highest input from program owners, administrative officers, and agency leadership. For more information on respondents, please see the Respondent Profile.
Executive Summary

Many cite slow progress in their digital transformation

Half of respondents say their agency lags behind other departments when it comes to acquiring new IT that can transform business processes. A fifth of respondents go even further, saying they are not at all satisfied with the rate of progress their agency made last year to modernize IT. And asked whether their agencies have sufficient processes, technology, strategy, and skills in place to conquer the digital transformation, at least half lack confidence that existing technology and processes can get them where they need to be. Effective digital transformation requires dedicated support, but agencies aren’t getting it.

Agencies are prioritizing IT that can improve internal processes

A clear majority of respondents say any new IT acquisitions are being made with an eye towards refining internal processes and capabilities (e.g., efficiency, worker development), as opposed to external improvements (e.g., engagement with citizens, public safety). Among a range of drivers, respondents cite policy mandates and directives as exerting the greatest influence over their organization’s decision to pursue digital transformation. However, less than a third of those surveyed say their agency has a target operating model in mind to guide digital transformation initiatives to success. The lack of clear direction presents a major hurdle to many digital transformation efforts.

Leadership is seen as a critical enabler for digital transformation

43% of respondents say C-suite leaders and program owners are equally critical to achieving digital transformation objectives. That being said, many respondents feel that communication and interdisciplinary collaboration has room to improve in the year ahead: 56% say their organization struggles to deploy cross-functional teams consisting of both IT and non-IT personnel, and a quarter of respondents feel their agency is not at all effective in helping leaders work collaboratively to deliver technology change. While respondents recognize the critical role that leadership can play, the picture they paint shows that digital transformation isn’t fully understood at the highest level where collaboration, education, and sharing of ideas can catalyze solutions to the most difficult transformation challenges.
Research Findings

Approximately half of those surveyed feel their organization lags behind in digital transformation.

“I consider my organization _________ other departments/ agencies when it comes to adopting new technologies to transform business processes.”

- 48% of respondents believe their organization trails other departments when it comes to adopting new technologies for transforming business processes.
- 38% say they are on pace with transformation trends.
- 14% feel their organization has surpassed others in transforming business processes using new technology.

Percentage of respondents, n=388
Note: Percentages may not add up to 100% due to rounding.
Federal agencies evince greater frustration with pace of IT acquisition than state/local counterparts

“I consider my organization _________ other departments/agencies when it comes to adopting new technologies to transform business processes.”

- **Federal**
  - Behind: 33%
  - Far behind: 18%

- **State/Local**
  - Behind: 29%
  - Far behind: 0%

1 in 2 federal respondents believe their agency is either behind or far behind peer agencies when it comes to adopting new tech to transform business processes.

29% of respondents in state and local government, meanwhile, feel they lag behind other state/local departments when it comes to tech acquisition for transformation initiatives.
Respondents are sharply divided on agency efforts to acquire transformative IT.

Respondents are mixed when evaluating how well their organizations have acquired transformative IT. While 52% are moderately, very, or completely satisfied with progress, another 48% are either not very or not at all satisfied in efforts to date.

Overall, the results show that agencies have enjoyed varying degrees of success when implementing new IT to transform business processes.
56% of respondents say internal considerations are pushing their agency to chase digital reforms

Organizations have a number of reasons to pursue digital transformation, but to what extent is this journey incentivized by internal benefits versus external benefits? A majority of those surveyed say internal considerations carry greatest weight in their organization’s decision-making process, with business intelligence and worker development expected to increase as transformative tech is brought on board.

Is your organization’s digital transformation dictated more by internal pursuits or external pursuits?

- **INTERNAL:** improvements to organizational efficiency, processes, intelligence, visibility, and worker development

- **EXTERNAL:** improvements to citizen services, field capabilities, engagement/outreach, public safety, and accessibility

- Neither

Percentage of all respondents, n=359
Note: Percentages may not add up to 100% due to rounding
Government mandates are driving agencies to pursue digital transformation initiatives

Top Motivations for IT Transformation
Ranked by respondents according to the factors they consider most influential

1st Policy mandates / directives (1242 pts)
2nd Gains to productivity / output (1241 pts)
3rd Improved safety / security (1216 pts)
4th Better customer/citizen service (1171 pts)
5th Opportunity to innovate mission capabilities (1148 pts)
6th Reducing redundancies / duplication (1078 pts)
7th Ability to leverage insights from data (960 pts)
8th Reducing obstacles to compliance (944 pts)

Overall, respondents feel that policy mandates and directives (such as the MGT Act and Cloud Smart) are the greatest drivers of digital transformation in their agency.

However, many say that gains to productivity and improved safety are top reasons as well.

Respondents were asked to respond to the following question: “Which factors hold greatest influence over your organization’s decision to pursue IT transformation? Please rank options from top to bottom by level of importance to your organization.”

Rankings and total scores are displayed here using the Borda count method, where each answer choice earns points based on the order in which respondents placed them. Each respondent’s top answer choice receives the maximum score of n points for that respondent, where n is equal to the total number of options. Each subsequent choice receives 1 less point than the one ranked ahead of it. Unranked answer choices receive zero points.

Please see Appendix for further detail.
“My agency, and the U.S. government, should develop **mid-to-long term digital strategies** that combine the introduction of new technology and 'up-skilling' people to use these innovative tools.

However, I'm not sure if we are asking the **right questions** when it comes to innovating to enhance our mission capabilities and how much impact digital transformation can have on the current and future government workforce.

There is a displacement effect, people’s skill sets are [becoming] outdated. This will be a **tricky balance** going forward.

*Survey Respondent*
Agencies concentrate IT around improving cybersecurity, data sharing, and process automation

According to respondents, cybersecurity, interoperability, and process automation will receive the brunt of attention in the near future when it comes to using IT to improve mission areas.

Respondents selecting “Other” specified a number of options not provided in the original choices, including telehealth services, health systems, financial systems, workplace applications, hardware replacement, collaboration technology, training, and constituent services.
Across the board, respondents are skeptical that agencies have what they need to transform

Most respondents lack confidence that their organizations have all the right ingredients to achieve successful IT transformation. 53% are only slightly or not at all confident that existing processes will enable them to complete this journey. Confidence is only slightly higher when it comes to evaluations of technology, strategic vision, and skills/expertise.

How confident are you that your organization has the desired __________ it needs to achieve successful IT transformation?

- Processes (n=324):
  - Not at all confident: 22%
  - Slightly confident: 31%
  - Moderately confident: 31%
  - Very confident: 14%
  - Extremely confident: 2%

- Technology (n=324):
  - Not at all confident: 22%
  - Slightly confident: 28%
  - Moderately confident: 34%
  - Very confident: 12%
  - Extremely confident: 4%

- Strategic vision (n=323):
  - Not at all confident: 21%
  - Slightly confident: 26%
  - Moderately confident: 33%
  - Very confident: 16%
  - Extremely confident: 4%

- Skills/expertise (n=322):
  - Not at all confident: 18%
  - Slightly confident: 29%
  - Moderately confident: 33%
  - Very confident: 15%
  - Extremely confident: 5%

53% of respondents are only slightly or not at all confident that existing processes will enable them to complete this journey.
Tight budgets and political gridlock are most common impediments to transformation efforts

What obstacles (if any) are responsible for delaying/sidelining digital transformation initiatives at your organization? Please limit your answer to three choices.

- **Limited funding**: 54%
- **Political/bureaucratic gridlock**: 40%
- **Shortage of skills/expertise**: 35%
- **Gaps in leadership/IT authority**: 32%
- **Siloed systems/processes**: 28%
- **Culture resistance**: 26%
- **Reluctance to sunset/replace legacy IT**: 20%
- **Other**: 5%
- **None of the above**: 1%
- **Don't know**: 8%

35% of respondents feel that a shortage of expertise is responsible for delaying digital transformation at their organization.

Aside from funding, internal politics and a shortage of expertise also complicate the digital mission. As one respondent says, “I realize the government has difficulty matching private sector pay, but we need to develop a happy medium so that we can acquire the skills necessary to meet the challenges posed by improving non-DoD IT system technology.”

Respondents selecting “Other” specified a number of options not provided in the original choices, including cybersecurity, lack of user interface and expertise, security validation requirements, lack of cohesion between lines of business, and mismanagement.
KPMG’s Perspective

Transformation starts with a laser focus on the constituent

Many associate Digital Transformation with migrating systems and applications to the Cloud, but they frequently overlook whether such systems can meet even current critical requirements, let alone mid-to-long term requirements. While the cloud is often a key aspect of many Digital services, there are many important and poorly understood aspects of Digital Transformation. This survey sought to understand the perceptions and current state of Digital Transformation efforts throughout the U.S. Federal and State and Local governments, and to understand any differences with broader commercial and global trends. The findings are stark, but the opportunity is great.

As findings in the survey show, government agencies face multiple challenges to Digital Transformation efforts. We find that many agencies are transforming for imprecise reasons, that their transformation efforts are not well understood, supported, and coordinated, and are generally perceived to under-deliver on the intended benefits.

For example, many respondents we surveyed say that internal (not external) drivers are dictating their agency’s transformation plans. This motivation may prevent agencies and the people and organizations that they serve from reaping the potential benefits of digital initiatives. Additionally, these motivations are in sharp contrast to the success we’ve observed by best-in-class commercial entities where the focus is on enhancing the client experience and supporting better mission outcomes.

Additional findings in the study back up these conclusions:

- Better customer/citizen service is 4th on the list of perceived motivations for driving transformation, and yet...
- When asked what mission areas their leadership is planning to improve through IT, just 13% of respondents identify citizen (or constituent) experience as a focus
- Therefore, respondents are skeptical of future progress: approximately half are not very or not at all confident that current processes, strategy, tech, or personnel are sufficient for successful transformation.

Interestingly, the majority of respondents anticipate an increase in future funding for digital transformation efforts. Given the current state of digital transformation depicted in this survey, we must question if government agencies will get the full value of increased future funding levels. To deal with some of these digital transformation challenges, agencies should reassess current efforts to ensure they have a unified Digital Transformation plan which aligns to the mission and business priorities of each agency.

Additionally, agencies should develop a target operating model that includes how end-to-end processes will be transformed and supported on a flexible and scalable cloud-based platform that embeds data and analytics capabilities to constantly analyze and improve processes and mission outcomes. This plan also needs to address the organization and skills needed to operate a digital enterprise. Since large transformation efforts are often risky and difficult to fund, this plan can be executed incrementally. But the important thing is that IT transformation efforts be properly planned and coordinated, and that they align with the business priorities of each agency. This is a complex effort, but the risks of inaction are too great. For more insights around KPMG’s vision of the ‘Future of IT’, visit kpmg.com/Future-IT.

Robert M. Dwyer
Principal, Federal Advisory Technology Leader, KPMG

Robert Dwyer is a Principal in KPMG’s Federal Advisory practice and leads KPMG’s Federal Civilian sector and the Federal Technology consulting practice. He has over twenty years of experience in the public sector with a focus on the planning and execution of large, transformational, strategic initiatives for large Federal clients, including business transformation and IT strategy and governance.
Many respondents have seen IT initiatives under-deliver and few feel personally invested

“In recent years, digital initiatives at my organization have delivered value _______ what was promised.”

| Far under | 20% |
| Somewhat under | 39% |
| On par with | 32% |
| Somewhat over | 5% |
| Far over | 3% |

To what extent do you feel personally invested in driving digital transformation at your organization?

| Not at all invested | 27% |
| Slightly invested | 22% |
| Moderately invested | 25% |
| Very invested | 19% |
| Extremely invested | 6% |

59% of respondents feel that digital initiatives in recent years have delivered value somewhat under or far under what was promised.

1 in 4 respondents feel very or extremely invested in their agency’s digital transformation journey.
Federal respondents are significantly more disappointed by digital initiatives in recent years than their state/local counterparts.

“In recent years, digital initiatives at my organization have delivered value ______ what was promised.”

**FEDERAL**

- Far under: 22%
- Somewhat under: 39%

**STATE/LOCAL**

- Far under: 4%
- Somewhat under: 18%

64% of federal respondents say digital initiatives have delivered value far under or somewhat under what was promised.

Just 22% of state/local respondents hold the same view.

Percentage of Federal respondents, n=225
Percentage of State/Local respondents, n=45
Better communication between agencies and contractors may be required to address technology

To the best of your knowledge, does your organization have a target or future operating model it uses to guide transformation plans toward a final, desired outcome?

- Yes: 29%
- No: 21%
- Don't know: 50%

Note: Percentages may not add up to 100% due to rounding

Percentage of respondents, n=313

To what extent does this target operating model align with your agency strategy?

- Not at all aligned: 1%
- Slightly aligned: 14%
- Moderately aligned: 37%
- Very aligned: 39%
- Completely aligned: 9%

Note: Percentages may not add up to 100% due to rounding

Percentage of respondents, n=90

29% of respondents acknowledge the existence of a target operating model guiding their agency’s transformation plans.
Many respondents see both C-suite leaders and program owners as critical to digital transformation

In terms of leadership, which group is more instrumental to ensuring digital transformation programs succeed in your organization?

- C-suite (i.e., CIOs, CDOs, CTOs, etc.) - 14%
- Program owners / mission owners - 25%
- Both play critical roles - 43%
- Neither - 19%

Percentage of all respondents, n=310
Note: Percentages may not add up to 100% due to rounding
“There’s no one in government who by default has this broad view of the citizen and how they are touched by all the services that government provides.

So the CIO really needs to share and communicate the vision of what the future of government looks like and how technology plays a role — not to replace anyone, but to enhance what they do.”

Mark Raymond, CIO of State of Connecticut
Cross-functional communication and IT collaboration is largely absent, according to respondents

<table>
<thead>
<tr>
<th>How effective is your organization when it comes to using cross-functional teams (IT and non-IT teams)?</th>
<th>How effective is your organization at ensuring leaders work collaboratively to deliver technology change?</th>
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<tbody>
<tr>
<td>Not at all effective</td>
<td>Not at all effective</td>
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<tr>
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<th>Percentage of all respondents, n=293</th>
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<td>Not at all effective</td>
<td>28%</td>
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<tr>
<td>Slightly effective</td>
<td>28%</td>
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<tr>
<td>Moderately effective</td>
<td>29%</td>
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<tr>
<td>Very effective</td>
<td>12%</td>
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<td>Extremely effective</td>
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<table>
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<th>Percentage of respondents, n=293</th>
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<tbody>
<tr>
<td>Not at all effective</td>
<td>24%</td>
</tr>
<tr>
<td>Slightly effective</td>
<td>30%</td>
</tr>
<tr>
<td>Moderately effective</td>
<td>27%</td>
</tr>
<tr>
<td>Very effective</td>
<td>16%</td>
</tr>
<tr>
<td>Extremely effective</td>
<td>3%</td>
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</table>

56% of respondents say their organization is slightly or not at all effective when it comes to deploying IT and non-IT personnel for cross-functional mission assignments.

1 in 4 respondents believe their organization is not at all effective when it comes to facilitating systems that combine leadership efforts in delivering technology change.
Organizations struggle to accommodate mix of skills and resources for ensuring digital success

How effective is your organization when it comes to _________________?

- Not at all effective
- Slightly effective
- Moderately effective
- Very effective
- Extremely effective

Using internal and external resources to access the right technology skills:
- 18% Not at all effective
- 33% Slightly effective
- 32% Moderately effective
- 14% Very effective
- 3% Extremely effective

Changing ways of working to maximize the value from technology:
- 22% Not at all effective
- 33% Slightly effective
- 30% Moderately effective
- 13% Very effective
- 2% Extremely effective

Ensuring non-IT staff have the right technology skills:
- 23% Not at all effective
- 28% Slightly effective
- 36% Moderately effective
- 11% Very effective
- 2% Extremely effective

Percentage of respondents, n=294
Note: Percentages may not add up to 100% due to rounding
Cybersecurity remains top priority on respondents’ wish list for IT transformation

Suppose your organization was provided with sufficient resources to fund all its digital transformation priorities for 2019. What items would receive the greatest share of resources?

- **Cybersecurity**: 56%
- **Hiring skilled experts/specialists**: 49%
- **Improving strategy/operating models**: 44%
- **Digital services**: 37%
- **Advanced data analytics**: 33%
- **Cloud migration**: 30%
- **Intelligent automation (e.g., RPA)**: 14%
- **Artificial intelligence / machine learning**: 10%

Removing financial considerations from the picture, 56% of respondents said cybersecurity would receive the lion’s share of digital transformation efforts in 2019.

The recruitment of skilled experts (49%), improvements to strategy and operating models (44%), and digital services (37%) also received attention.

44% of respondents say that improvements to strategy and operating models would receive most attention if they had all the funding they needed.
58% of respondents anticipate increases to digital transformation funding in 2019

Compared to past year’s levels, how much do you anticipate your organization will invest in digital transformation technologies in 2019?

According to respondents, digital transformation initiatives should receive higher volumes of funding in 2019 relative to past years. In fact, 18% of those surveyed believe funding will increase by 50% or more in the year ahead, a drastic shift in purchase priorities from recent years.

35% anticipate funding levels will remain the same, and only 9% says digital transformation will receive less funding than years before.
What Respondents Say...

“What does digital transformation mean to you? Please feel free to express your approval or disapproval of how your organization is achieving digital transformation.”

- Access to technology that makes my job easier, not more complicated with programs that bog down the speed of the processor.
- Ability to work from anywhere with ease and having successful results.
- Moving away from a dependency on hard copy and terrestrial methods to manage all aspects of the agencies mission.
- It’s going from paper reliance to an electronic format in all means of transmitting and analyzing information. My agency is very frustrating in this regard. There is not enough urgency nor the skills needed to fully develop the capabilities of moving to a digital platform.
- Using digital technology to solve common problems.
- Better communication and access to medical records across multiple platforms and outside medical systems.
- Digital transformation has to be more than a data collection point, it has to interface smoothly with users without chronic outages, reboots, or constant delays in screen refresh time.
- Moving to the cloud!
- Digital transformation is the integration of digital technology into all areas of a business, fundamentally changing how you operate and deliver value to customers.
- It means automation and enhanced security for software/hardware.
- It's a cultural change that requires organizations to continually challenge the status quo, experiment, and get comfortable with failure. I think my organization is attempting digital transformation but it’s a very slow process with many barriers.
- Digital transformation means that I can use IT to perform my job more efficiently and capably.
- Planning and successfully executing your digital strategy to the greater improvement and benefit of the organization.
- Identification and implementation of technologies to improve efficiency and accountability across all areas of the organization.
- Invested in hiring opportunities for qualified people
- It means staying up to date with the latest technologies needed to combat cyber intrusions, and for storing data in the cloud.
Looking Forward

To rally support behind objectives, agencies can make communication channels and decision-making chain more clear

In the year ahead, objectives like cybersecurity, data sharing, and process automation will receive the lion’s share of attention when it comes to IT that can improve how governments function. But if such benefits are to be realized, agencies need to adopt a governance structure that clarifies decision-making power and strategic vision to the whole enterprise. Currently, less than a third of respondents believe their organization uses a target operating model to guide digital transformation to a successful end state. And respondents point to a lack of collaboration among leaders and cross-functional teams that, if corrected, could pave the way for smart digital-minded reforms. Instituting clear direction and collaborative policies from the CIO level down to the rest of enterprise will go a long way toward ensuring these goals are met.

Create employee investment by reorienting transformation to serve the citizen

Every transformation program is guaranteed to stall without the support of the workforce behind it. At the moment, 49% of those surveyed do not feel personally invested in their agency’s digital transformation. Therefore, it’s not surprising that 59% feel digital initiatives have under-performed in recent years. Employees want to know their efforts are paying off for the people they were called to serve, and this only happens when an organization elevates constituent concerns over internal motivations. The most successful transformation programs are able to improve internal efficiency while delivering new benefits to the public. Agency leadership can take the opportunity to revise their strategy such that mission outcomes take center stage, thereby motivating the rest of the workforce to invest in long-term digital transformation.
Respondent Profile

Most respondents hold senior-level positions in the federal government

Employment situation

- Active duty military: 2%
- Federal civilian (non-DoD): 61%
- DoD civilian: 19%
- State government: 4%
- Local government: 14%

21% of respondents identify as either Active Duty Military or Department of Defense civilians.

Note: Percentages may not add up to 100% due to rounding.
Respondents represent a senior audience of decision-makers wielding significant oversight

### Job grade/rank

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<tr>
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<th>Percentage of Respondents</th>
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<td>GS/GM-15</td>
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<td>GS/GM-12</td>
<td>17%</td>
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<td>GS/GM-11</td>
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<tr>
<td>GS/GM-10 or below</td>
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<tr>
<td>Other</td>
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### Direct oversight/reports

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<td>1 to 5</td>
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<td>1 to 20</td>
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<td>21 to 50</td>
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<td>51 to 200</td>
<td>6%</td>
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<td>Over 200</td>
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Percentage of respondents, n=316
Note: Percentages may not add up to 100% due to rounding

Percentage of respondents, n=285
Note: Percentages may not add up to 100% due to rounding

56% of respondents hold rank at the GS/GM-13 level or above, including Senior Executive Service personnel and military officers of equivalent rank.

58% of respondents have direct oversight over one or more employees.
Most widely represented are program managers, administrative officers, and agency leadership.

**Departments and agencies represented**

- Agriculture
- Army
- Homeland Security
- Navy
- Air Force
- Veterans Affairs
- Treasury
- Housing & Urban Development
- Transportation
- Interior
- Environmental Protection Agency
- Health & Human Services
- NASA
- Justice
- Transportation
- State
- Office of the Secretary of Defense
- Energy
- Commerce
- General Services Administration
- Labor
- Intelligence Community/ODNI
- National Science Foundation
- Justice
- Social Security Administration
- Marine Corps
- Congress
- Government Accountability Office
- Education
- Office of Personnel Management
- Small Business Administration
- Nuclear Regulatory Commission
- Executive Office of the President (OMB)
- Other independent agency

**Percentage of respondents, n=285**

- Program management: 14%
- Administrative services: 12%
- Agency leadership: 8%
- Human resources: 7%
- Technical/scientific: 7%
- Customer service: 6%
- Information technology: 6%
- Acquisition/procurement: 6%
- Finance: 5%
- Healthcare professions: 4%
- Policy research/analysis: 4%
- Facilities management: 4%
- Audit/inspectors general: 3%
- Public safety: 2%
- Legal: 2%
- Communications/PR: 1%
- Other: 9%

Note: Percentages may not add up to 100% due to rounding.

Departments and agencies are listed in order of frequency. Respondents were asked to choose which single response best describes their job function.
Which factors hold greatest influence over your organization’s decision to pursue IT transformation? Please rank options from top to bottom by level of importance to your organization.

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<tr>
<th>Count per rank</th>
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<td>Policy mandates/directives</td>
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<td>47 25 32 35 24 27 16 44</td>
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<td>Opportunity to innovate mission capabilities</td>
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<td>Reducing redundancies/duplication</td>
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<td>Ability to leverage insights from data</td>
<td>16 24 23 29 36 36 43 43</td>
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<td>Reducing obstacles to compliance</td>
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</tbody>
</table>

Rankings and total scores are displayed here using the Borda count method, where each answer choice earns points based on the order in which respondents placed them. Each respondent’s top answer choice receives the maximum score of \( n \) points for that respondent, where \( n \) is equal to the total number of options. Each subsequent choice receives 1 less point than the one ranked ahead of it. Unranked answer choices receive zero points.

For instance, if a respondent’s ranked choices were 1) Policy mandates/directives, 2) Gains to productivity/output, and 3) Improved safety/security, those responses would receive 8, 7, and 6 points respectively. These points would be added to Borda count of each answer choice.

With 250 respondents and 8 choices, the maximum score possible for any single answer choice (i.e., if every respondent ranked it as their top outcome) is equal to 2,000 points (250 x 8).
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KPMG LLP

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