



# 2026 ANNUAL REPORT

Agency of Digital Services  
3 V.S.A. § 3303

**Submitted by**  
Denise Reilly-Hughes, Secretary & CIO

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## EXECUTIVE SUMMARY

The Agency of Digital Services (ADS) is responsible for supporting the Administration's goals of growing the economy, making Vermont more affordable, and protecting the most vulnerable. To meet these goals, the Agency is committed to providing enterprise-wide, cost-effective, and customer-focused digital technology services and solutions in a secure, reliable, and up-to-date manner.

Equally important to supporting the continuity of the state's information technology services, ADS oversees strategic investments in technology and orchestrates the timing and progression of digital government enhancements.

In alignment with Governor Scott's priorities, the Agency of Digital Services identified the following four goals:

- **By 2027**, increase the automation and reliability of services delivered to Vermonters through modern technology, enabling a more unified and accessible user experience.
- **By 2027**, support the creation of a comprehensive Executive Branch IT budget with greater transparency and predictability.
- **By 2027**, improve Vermonters' experience with government online interaction.
- **Continuously** defend the state data network and raise employee and citizen awareness of cyber risks to reduce the likelihood of unauthorized access and misuse of Vermont and Vermonter data.

## AGENCY STATUTORY LANGUAGE

During the 2019 Legislative Session, statutory language referencing the roles and responsibilities of the Department of Information and Innovation (DII) was replaced with the Agency of Digital Services (ADS). With the passage of Act 49 of the 2019 session, ADS assumed responsibility as the single entity created to provide information technology services and solutions to the State government. The legislation additionally updated the Agency's reporting requirements. As required by law, ADS is responsible for providing an annual report and an updated strategic plan.

## OUR FOCUS IN 2026

### One ADS – Vermont's Three-Year Organizational Strategy

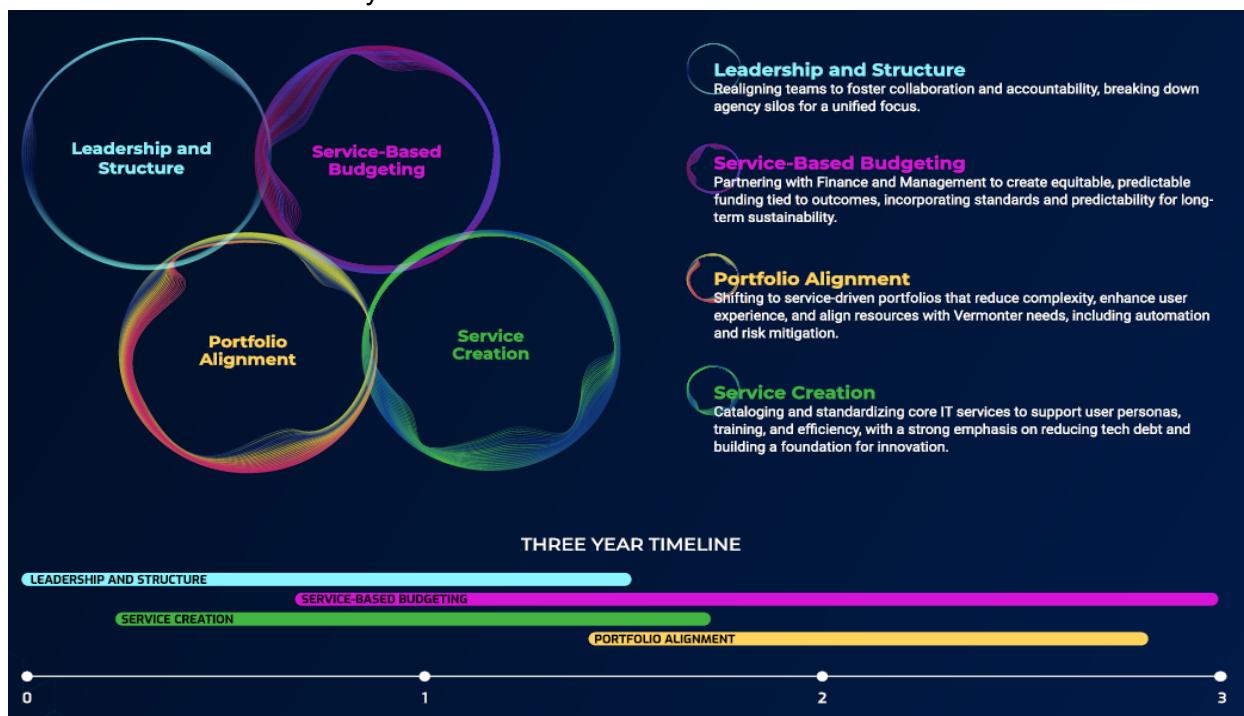
Over the next three years, the Agency of Digital Services (ADS) is focused on delivering greater value, reliability, and transparency to Vermonters through a unified approach known as **One ADS**. This strategy acknowledges that while many of the state's technology systems remain dependable, they are fragmented, isolated, and increasingly difficult to maintain. One ADS provides a clear path forward by modernizing how technology is organized, funded, and delivered, without losing sight of the people who rely on it every day.

At the core of this strategy are four value expectations that guide all decision-making. First, **User Experience** ensures that Vermonters and state employees encounter simple, intuitive, and consistent digital services, regardless of agency or program. Second, **Standards** ensure shared frameworks for technology, documentation, training, service delivery, reducing silos, and improving reliability across government. Third, **Reducing Complexity** addresses long-standing technical debt by simplifying systems and processes, strengthening security, and allowing resources to sustain while creating enablement for innovation. Fourth, **Predictability** introduces service-based budgeting and funding models that improve transparency, stabilize costs, and mitigate unexpected financial pressures.

To turn these values into action, ADS is advancing four coordinated initiatives.

- 1) **Leadership and Structure:** realign teams to strengthen collaboration and accountability across agencies.
- 2) **Service Creation:** defines and standardizes core IT services and field IT services, making them easier to manage, support, and improve over time.
- 3) **Portfolio Alignment:** ensures technology investments are driven by clear service outcomes and Vermonter needs, rather than isolated projects.
- 4) **Service-Based Budgeting:** ties funding to defined services and performance, creating a more sustainable and predictable financial model for the State.

Together, these efforts form a practical, phased approach to transformation, one that enhances service delivery today while laying the groundwork for a resilient, secure, and equitable digital foundation for the future. One ADS is not simply a technology initiative; it is a commitment to making state government easier to navigate, more efficient to operate, and better positioned to serve all Vermonters in the years ahead.



# ADS IT STRATEGIC PLAN

The Agency of Digital Services' Strategic IT Plan outlines a clear, multi-year approach to modernizing Vermont's technology environment, improving service delivery, strengthening security, and ensuring long-term sustainability.

Guided by a vision of secure, accessible government services and a mission centered on collaboration and simplicity, the plan focuses on four core priorities:

- 1) **Simplifying systems to reduce complexity** and technical debt.
- 2) **Enhancing statewide standards** for cybersecurity, data, and enterprise services.
- 3) **Improving the user experience** for Vermonters and state employees through streamlined and digital-first services.
- 4) **Increasing predictability and transparency** in IT investments and budgeting.

Together, these strategies align technology decisions with public needs, reduce costs and risk over time, and create a more resilient, efficient, and user-focused digital government for Vermont.

| Agency of Digital Services<br>Strategic Plan 2024–2028   |  |
|--|--|
| <br><b>STRATEGY</b>  | <b>SIMPLIFYING TO REDUCE COMPLEXITY</b> <ul style="list-style-type: none"><li>Strengthen our digital foundation by replacing legacy IT systems with integrated preferred enterprise platforms, thereby reducing technical debt</li><li>Deploying new systems by utilizing cloud-based offerings to reduce our infrastructure footprint and total cost of ownership.</li><li>Enable AI responsibly and securely while maintaining the highest standards</li></ul><br><b>BREAKTHROUGH INDICATORS</b> <ul style="list-style-type: none"><li>5 existing infrastructure-based systems migrated from OnPrem to Cloud Managed Services</li><li>Replacement of 30 legacy applications with State-preferred enterprise platforms</li></ul>  |
|  | <b>VISION:</b> To provide government services that are secure and easily accessible to all people doing business and interacting with the State of Vermont.<br><br><b>Mission:</b> To collaborate with our partners in state government to deliver simple and intuitive technology solutions that improve the lives of Vermonters.   |
| <br><b>STRATEGY</b> | <b>USER EXPERIENCE</b> <ul style="list-style-type: none"><li>Increase the number of simple, low-cost, online interactions that Vermonters have with their government.</li><li>Build a closer online relationship with Vermonters, including single sign-on capability</li><li>Improve Vermonter's experience with state government by transitioning outdated paper processes with online, streamlined services</li></ul><br><b>BREAKTHROUGH INDICATORS</b> <ul style="list-style-type: none"><li>48 public-facing applications utilizing myvermont.gov single sign-on</li><li>Provide 10 native mobile applications as alternative to existing public-facing services</li><li>50 public-facing processes automated with next-generation technology</li></ul>   |
|  | <b>ENHANCING STANDARDS</b> <ul style="list-style-type: none"><li>Raise employee and Vermonter awareness of cyber risk and data privacy through training and reporting</li><li>Coordinate cybersecurity policies and practices throughout State Government</li><li>Improve data-driven decision making related to public health and safety through the development of robust data analytics, governance, and management systems</li><li>Establishment of Core Enterprise Services as the foundation available to every user, agency, and department in state government.</li></ul><br><b>BREAKTHROUGH INDICATORS</b> <ul style="list-style-type: none"><li>90% completion of Cyber-awareness training quarterly by state employees</li><li>Application and data risk evaluations integrated into the 12 cabinet-level IT investment plans</li><li>12 cabinet-level agencies and departments with technology risk evaluation report cards</li><li>Standard Service model of IT support of all Core Enterprise Services</li><li>5 data sets available for analysis in the new data environment</li><li>All Dashboards and analytics available through PowerBI</li></ul> |
| <br><b>STRATEGY</b> | <b>PREDICTABILITY AND TRANSPARENCY</b> <ul style="list-style-type: none"><li>Proactively reduce the number of applications through consolidation and elimination. This will result in lower IT maintenance costs, purchasing costs, licensing costs, and employee costs over the life cycle.</li><li>Improve the 5-year IT roadmap and investment plans for all agencies aligned to the ongoing modernization of government</li><li>Utilize improved standards to provide timely and accurate budget and expenditure information to IT decision-makers.</li><li>Continue focus on investment and services in cybersecurity and core enterprise services</li></ul><br><b>BREAKTHROUGH INDICATORS</b> <ul style="list-style-type: none"><li>12 cabinet-level agencies to have a complete 5-year IT roadmap and investment plans that are updated annually</li><li>Track spending of managed and supported services as well as bespoke purchase investments.</li><li>A minimum of 10% of IT budget dollars invested in security initiatives</li><li>Implement a technology business management solution</li></ul>   |
|  |   |

# OUR SUCCESS IN 2025

## Technology and Enterprise Services

### ADS Technology Services – Year in Review

Over the past year, ADS Technology Services has delivered transformative improvements across five key service areas: Enterprise Application Services, Service Desk & Desktop Solutions, Core Enterprise Services, Field Services, and Network Services. By focusing on modernization, automation, and user experience, we have driven measurable gains in efficiency, reliability, and customer satisfaction.

#### Simplifying to Reduce Complexity Through Enterprise Application Modernization

Enterprise Application Services made significant strides in modernizing the state's technology foundation. Multiple legacy applications were successfully migrated to cloud platforms, resulting in reduced infrastructure costs and achieving 99.9% uptime. Major Enterprise Resource Planning (ERP) upgrades and Customer Relationship Management (CRM) enhancements introduced advanced analytics capabilities, improving forecasting accuracy and boosting customer engagement. Automation initiatives, including the deployment of robotic process automation (RPA), saved thousands of labor hours annually. Security remained a top priority, with ADS achieving IRS and CJIS certifications and implementing a zero-trust security model across application layers.

#### Improving User Experience Through Modern, Efficient Service Desk Solutions

In Service Desk & Desktop Solutions, the team played a pivotal role in supporting the return of 11,000 employees to on-site work, ensuring seamless device setup and connectivity. A major milestone was the completion of an enterprise-wide migration to Windows 11, which delivered enhanced security features, improved performance, and modernized user experience. Service Desk operations became more efficient, reducing ticket resolution times by 20% through process optimization and the implementation of self-service portals. The introduction of ChatVT, an AI-driven virtual assistant, resolved 15% of incidents without human intervention, while streamlined device lifecycle management cut deployment times by 25%.

#### Enhancing Statewide Standards Through Reliable and Resilient Core Enterprise Services

Core Enterprise Services focuses on strengthening the reliability and resilience of the state's technology backbone. Upgrades to core systems have increased availability to 99.95% across enterprise platforms. Centralized data governance and enhanced backup solutions reduced recovery times by 50%, while compliance frameworks have been reinforced to meet stringent financial and operational requirements.

## Improving User Experience Through Customer-Centric Field IT Services

Field Services shifted to a more customer-centric support model, working in closer partnership with Core Enterprise Services and agency-embedded staff to deliver IT modernization efforts in a more coordinated and responsive way. This approach better aligned technology support with agency business needs and improved day-to-day service. As part of this shift, on-site “genius bar” events were held in November at multiple agency locations to support agencies returning to the office. These sessions addressed common device, connectivity, and workspace issues, including monitors, speakers, microphones, and cameras, ahead of staff returning, helping ensure a smoother transition back to in-person work. The events proved effective and have continued, providing a faster and more accessible alternative to submitting a ticket and waiting for assistance.

## Enhancing Statewide Standards Through Modern, Secure, and Resilient Network Services

Finally, Network Services delivered some of the year's most impactful infrastructure upgrades. A statewide network project was launched to modernize connectivity across all state office locations, with final completion targeted for FY27. This initiative will deliver enhanced performance, resilience, and centralized management for next-generation networking. ADS also embraced a wireless-first strategy, installing 900 additional wireless access points to enhance mobility and coverage for staff and visitors across locations. Networking hardware was upgraded to next-generation platforms, tripling bandwidth and enabling the scanning and filtering of 8x more traffic without compromising performance. These efforts, combined with advanced threat detection and next-gen security measures, have strengthened the state's cybersecurity posture while achieving a 99.99% uptime across critical network infrastructure.

## Security Division

### ADS Security – Year in Review

In 2025, ADS Security monitored **358.8 billion security events** across the state, leveraging advanced tools and AI-driven analytics to detect and respond to threats in real time. These efforts strengthened cybersecurity, protected critical systems and data, and ensured reliable, secure services for Vermonters and state employees. The Security Division continues to make meaningful progress in strengthening Vermont's cybersecurity posture through improvements in vulnerability management, faster security operations response, and increased use of automation.

## Enhancing Statewide Standards Through Accelerated Cybersecurity and Risk Reduction

Over the past year, ADS significantly accelerated its vulnerability reduction efforts by partnering closely with system and application owners, prioritizing remediation, and retiring systems that were no longer needed. As a result, Vermont achieved a substantial reduction in known security

risks by early 2025, representing a major step forward in protecting state systems, data, and services relied upon by Vermonters.

This progress is important not just from a technical standpoint, but because it directly reduces the likelihood of cyber incidents that could disrupt essential government services or expose sensitive information. It also demonstrates the value of coordinated enterprise-wide action in addressing cybersecurity risk.

At the same time, Vermont continues to address the realities of long-standing technical debt common across state governments nationwide. Some older systems remain difficult to modernize or fully remediate due to their age and design. Addressing these challenges will require sustained investment, strategic modernization planning, and ongoing collaboration across state government.

Overall, the work completed to date reflects a strong foundation and clear momentum toward a more secure, resilient, and reliable technology environment for the State of Vermont.

### Enhancing Statewide Standards Through Faster, More Effective Security Operations

As for security operations ticketing, ADS Security reduced ticketing response time from 37.3 days (on average) to 3.5 days (on average), representing a 93.8% reduction. Similarly, response to critical alerts fell from 9 minutes in 2024 to <1 minute in 2025.

The email security statistics align with known threat patterns and reinforce the importance of the existing safeguards. From January 1, 2025, to December 31, 2025, phishing attacks targeting ADS email addresses increased by 299% quarter over quarter. Our email security tool processed 172,905,807 email messages in 2025, preventing 94,673 spam messages and remedying 17,040 malicious email attacks.

### Enhancing User Experience Through Strengthened Identity and Access Controls

In July 2025, ADS Security implemented a new measure to further enhance our password management security. ADS enabled a technological feature that blocks users from using weak or easily guessed passwords. This tool operates behind the scenes with our existing systems to mitigate the risk of cyberattacks caused by predictable or commonly used passwords. It's especially useful for organizations like Vermont that connect both cloud services and traditional on-site systems.

ADS also implemented new technical controls that restrict who can register devices with the State's identity and access management system. Previously, device registration was widely available, increasing the risk that unmanaged or personal devices would be treated as trusted state devices. These controls reduce the likelihood of unauthorized or unapproved devices connecting to state systems, help limit shadow IT, and make it more difficult for attackers to maintain a persistent presence within the environment.

## Enhancing Statewide Standards Through Automated Security Monitoring and Response

In late 2025, ADS Security expanded its use of automation by integrating key components of the State's security monitoring and response platforms. This enhancement strengthened the state's ability to collect and analyze system activity in real-time, enabling a more rapid and consistent response to potential threats.

By automating previously manual actions, the Security team significantly improved efficiency and scalability, enabling analysts to focus on higher-value investigative and defensive work. During the fall of 2025, the state's automated security platform processed more than **1.1 million events**, representing an estimated **3,121 workdays saved**, equivalent to the effort of **approximately 104 full-time employees**.

While enterprise security platforms represent a significant investment, their value is substantial. These automation capabilities enable the State to operate at enterprise scale, respond reliably to high volumes of activity, and protect critical systems without requiring a proportional increase in staffing. Collectively, these improvements strengthen Vermont's security posture while delivering measurable operational and financial value to the State.

## Enhancing Statewide Standards Through Rigorous Security and Compliance Audits

ADS Security's compliance team remained hard at work throughout the year, successfully completing a wide range of required audits that are essential to the State's ability to operate critical programs and protect sensitive information. These efforts included audits for federal partners, such as the Social Security Administration, covering systems used by ADS, the Agency of Human Services (AHS), and the Department of Motor Vehicles (DMV), as well as audits for the Centers for Medicare & Medicaid Services (CMS), which supported Vermont Health Connect.

In addition, the team completed audits required by Vermont's Treasurer and retirement systems and supported ongoing requirements to maintain the State's cybersecurity insurance coverage. Collectively, this work helps ensure Vermont remains eligible for federal funding, maintains public trust, and meets the security and compliance standards needed to continue delivering essential services to Vermonters without interruption.

## Finance Division

### Increasing Predictability and Transparency Through a Modernized IT Financial Model: Core Enterprise Services (CES)

The ADS Division of Finance has embarked on a transformative journey to redefine the financial model that supports the Agency of Digital Services. In collaboration with the Department of Financial Management (DFM), we have meticulously identified services used universally by the executive branch and developed a more effective cost-allocation strategy for our partners in

state government. This transformation marks a significant shift from previous billing structures, such as Service Level Agreements (SLAs) and Timesheets, to the new ADS Allocation model, known as Core Enterprise Services (CES). Under CES, all users within the Executive Branch, regardless of department, office, or agency, can expect uniform services, eliminating discrepancies in user experience caused by varied billing methods. This change was thoroughly discussed and defined during the last legislative session, setting the stage for FY27 budgets to reflect this restructuring.

The CES model encompasses a comprehensive range of service categories and associated costs, ensuring equitable access to essential digital services across state government. These categories include AI Governance & Admin, Core Essentials I, II, and III, Data Governance & Admin, Domain Services, EPMO Essentials, IT Procurement Services, Mandatory Security Testing, Network Access, Network Security I, II, and III, and Private/Public Cloud Essentials. Each category is designed to provide foundational support and security, enabling seamless operations and informed decision-making. While CES covers these broad service areas, SLA will address enterprise licensing costs and consumption for Private Cloud services such as Adobe, Salesforce, Azure DevOps, and Globalscape. The Timesheet model will cater to department-specific needs, primarily project-related tasks or activities outside CES categories, such as direct cyber incident handling, department-specific project management, or application development and support. This strategic financial transformation ensures that all state employees have fair and equal access to digital tools and resources, supporting a dynamic and evolving workforce.

## IT Modernization Fund

| Expenditure Detail through 12/31/2025 |  |                      |                      |                      |                      |
|---------------------------------------|--|----------------------|----------------------|----------------------|----------------------|
| DEPT ID                               | Project  | Legislative Budget   | ADS VISION Approp    | Expenditures         | Remaining Amount     |
| 1105892304                            | Enterprise Resource Planning (ERP)               | 11,800,000.00        | 11,800,000.00        | -                    | 11,800,000.00        |
| 1105892305                            | Workplace Information Management System (WIMS)   | 1,800,000.00         | 1,800,000.00         | 889,028.89           | 910,971.11           |
| 1105892306                            | Fire Safety Modernization                        | 960,000.00           | 960,000.00           | 633,805.20           | 326,194.80           |
| 1105892307                            | Attorney General's Office Case Management System | 2,200,000.00         | 2,200,000.00         | 188,614.00           | 1,896,777.78         |
| 1105892308                            | DMV Core System Modernization                    | 20,250,000.00        | 20,250,000.00        | 20,250,000.00        | -                    |
| 1105892309                            | Unemployment Insurance Modernization             | 30,000,000.00        | 30,000,000.00        | 8,913,303.00         | 5,239,693.60         |
| 1105892401                            | State Network Modernization                      | 10,000,000.00        | 10,000,000.00        | 1,900,939.68         | 7,252,763.02         |
| <b>Grand Total</b>                    |  | <b>77,010,000.00</b> | <b>77,010,000.00</b> | <b>32,775,690.77</b> | <b>27,426,400.31</b> |

In FY2022, a unique funding source was established to support Information Technology projects during the implementation phase. This fund is designed to provide the financial support needed to modernize the state government's operations. In that first fiscal year, six projects were identified and funded, setting them on a fast track for modernization. In the second year, funding was provided to support the redesign and modernization of the State's aging Network.

Infrastructure. As the steward of the fund, ADS is responsible for tracking all expenditures. The following is a report of activity through December 31, 2025:

## Strategic Programs Division

### Strategic Programs Office – Year in Review

In Fall 2025, the Vermont Agency of Digital Services (ADS) established the Strategic Programs Office to enhance the efficiency, effectiveness, and innovation of business transformation and enterprise project delivery within the executive branch. This office provides comprehensive support in enterprise architecture, business transformation, project management, and business analysis.

The mission of the Strategic Programs Office is to align technology initiatives with the state's strategic objectives, streamline processes, and foster a culture of continuous improvement across all departments. By offering expert guidance and collaborative solutions, the office enables state agencies to deliver exceptional services to Vermont's citizens.

ADS is committed to driving innovation and ensuring technology acts as a catalyst for improved public service delivery, benefiting the entire state.

The Strategic Programs Office comprises three business units:

1. **Enterprise Project Management Office (EPMO):** This team of IT Portfolio Managers, Program Managers, Project Managers, and Business Analysts supports the successful completion of IT projects across Vermont's Executive Branch.
2. **Business Transformation Office:** This unit drives strategic change, enhancing government efficiency and responsiveness. It standardizes processes, aligns efforts, and removes obstacles, ensuring effective execution of transformation initiatives and offering a unified view across the enterprise.
3. **Enterprise Architecture Office:** This office provides a structured approach to IT decision-making aligned with statewide priorities. Operating under a federated governance model, it ensures IT investments are aligned, cost-effective, and secure, while supporting scalability and modernization.

By integrating Business Transformation services and Enterprise Architecture into the Strategic Programs Office, ADS can better support customers from concept through operations. This holistic approach ensures the successful implementation of business transformation initiatives, encompassing change management, solution alignment, process improvement, and project delivery.

### Simplifying Systems, Enhancing User Experience, and Increasing Transparency through Enterprise Project Delivery

The past year marked a period of significant achievement for the Enterprise Project Management Office (EPMO), with 20 major projects reaching completion and delivering tangible

improvements across Vermont's state government. These projects reflect a deliberate focus on modernizing infrastructure, enhancing public services, improving health and human services, and strengthening public safety systems.

**Infrastructure & Security:** Foundational upgrades across the state's technology environment set the stage for more secure and reliable operations. The Windows 11 Upgrade modernized the state's workstation environment, ensuring employees have access to the latest productivity and security features. The ADS ACD Modernization enhanced the state's call center capabilities, improving response times and service quality, while the implementation of Shared Services VoIP provided a more unified and cost-effective communication system for agencies across Vermont.

**Public Services:** The EPMO made significant strides in improving the citizen experience with government. The Vermont Business Portal and the Secretary of State's Business Filing System streamline interactions for businesses, simplifying processes that were once complex and paper-intensive. Meanwhile, the AOT DMV Core Systems Replacement modernized Vermont's DMV operations, enabling faster, more efficient service for Vermonters and reducing system maintenance challenges associated with the legacy infrastructure.

**Health & Human Services:** In the health sector, projects focused on creating a more connected and interoperable data environment. The implementation of FHIR standards for the Vermont Department of Health enhanced the sharing and use of critical health information, supporting better decision-making and care coordination. Simultaneously, three major workstreams of the Vermont Health Information Exchange expanded the state's capacity to securely share health data across agencies, providers, and community partners, improving the delivery of services to Vermonters.

**Public Safety:** Public safety agencies benefited from modern tools that improve operational efficiency and decision-making. The DPS Data Dashboard provides leadership with a consolidated view of critical metrics, enabling data-driven decisions to support statewide safety initiatives. Additionally, the VSP Workforce Management Scheduling Solution ensures more effective allocation of personnel, helping officers respond to community needs more efficiently and safely.

## Data & Artificial Intelligence Division

### Data & Artificial Intelligence – Year in Review

During 2025, the Data and AI Division focused on establishing statewide service offerings. This focus on standards, predictability, and simplification has already begun showing returns in the form of better service, innovation, and reduced costs. Throughout the year, dozens of states reached out to learn how Vermont manages its data and AI programs and how we achieve such a significant impact at a low cost. Vermont presented on our innovations and service delivery at more than a dozen local and national conferences, fostering relationships across state lines with partner vendors, Vermont's educators, and Vermont communities. The technology community in

Vermont has never been better connected, and we're continuing to lean into relationships that can be a force multiplier to build Vermont's workforce and economy in these high-demand fields.

### Improving the User Experience: Developing Vermont's Tech Talent Through Apprenticeships

A noteworthy example of ADS's innovative approach to both workforce development and service delivery is the apprentice cohort we established in 2025. ADS partnered with Catalyze to identify and develop 9 apprentices from communities across Vermont who showed aptitude and interest for learning tech, but were in various career stages of managing a hotel, working in retail sales, or other non-IT jobs. Some had studied tech but found it difficult to "break in" to their first tech job without prior experience. The apprentice program is a win for Vermonters interested in a career change to technology and a win for Vermont.

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*The first day we met the apprentices in person, two of them thanked me for the opportunity to serve Vermont in this way, saying they were looking at relocating outside of Vermont to support their families until they saw this opportunity for a long-term career. – Josiah Raiche, Chief Data and AI Officer.*

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ADS worked with Catalyze to design a rigorous, practical 5-month paid training program and a 2-year apprenticeship that will expose candidates to a broad range of technology roles, starting with Data and AI. These apprentices will bring their skills to the state agencies they are assigned to, and can convert to state employees at the end of the apprenticeship or go on to bring their IT skills to Vermont companies. 6 months into their time with ADS, all 7 apprentices are eminently employable and an asset to the State and any future employer seeking a strong, self-motivated technologist.

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*I have been thoroughly impressed by the apprentices' ability to quickly learn new technical systems, get onboarded onto projects, and make a tangible impact. From improving our web accessibility stance to making critical contributions to our ongoing AI work, they have played a central and impactful role on our team.*

*Miles Latham, Director of Artificial Intelligence*

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*Their remarkable productivity is a testament to their exceptional teamwork and collaborative spirit. In an environment where competition could easily arise, they have embraced the powerful mantra: "None of us are as strong as all of us." Their supportive and healthy team dynamic has been key to their success.*

*Shannon Doney, Director of Constituent Engagement.*

*“Everyone here has been great. I’m enjoying this assignment a lot. I am learning here and also able to apply the knowledge I do have to the tasks I have been given.”*  
*Ryan, Apprentice*

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## Improving User Experience: Bringing Secure and Capable AI Tools to Every State Employee

Within the Data and AI Office, the AI Division is tasked with overseeing and enabling the adoption of Artificial Intelligence within the State. Our flagship service, ChatVT, continues to evolve apace with industry leaders and now offers secure, ethical AI features, including Retrieval Augmented Generation, Tool Calling, and Model Context Protocol integrations. These new features continue to drive adoption by State Employees, bringing the all-time user count to 15% of the total state workforce. By December, more than 700 state employees were actively using the tool, including using its features to chat with more than 500 documents. And because ChatVT is built in-house, we can offer all State employees a capable, secure, and controlled AI environment for around \$1 per user. Users who “outgrow” ChatVT can procure commercial AI tools. No other state currently offers every state employee and contractor unlimited access to a secure general-purpose AI tool.

Other key accomplishments include the rollout of an [AI Disclosure](#) for use during procurements, a pilot program for Microsoft’s Copilot AI, numerous AI training sessions, strategic adoption discussions, and dozens of AI pilots within state agencies. ADS worked with the Agency of Transportation and the Department of Liquor and Lottery to develop AI-focused roles within their organizations to drive AI-powered process transformation. As AI continues to evolve and become used regularly within agencies, it will be critical for agency leaders to establish AI-responsible business roles within their operations teams.

ADS is nearing the launch of an “AI Pilot Factory”, which will allow us to partner with local higher education and industry partners on safe AI experimentation for purpose-built AI solutions with the opportunity to scale to production use.

## Improving User Experience: Vermont Center Geographic Information

The ability to check water quality of water sources in Vermont, investigate where a plow is traveling during a snowstorm, explore historic aerial imagery, call 911, examine the location of flood-prone areas, or look up any listed Vermont property in 2025, is powered by State of Vermont’s geospatial infrastructure. Whether for critical emergency response, complex engineering, or daily decision-making, the state’s digital geography was working quietly in the background. In 2025, the background activity accelerated to a historic pace. For the first time, the State of Vermont’s servers fielded over 1 billion map service requests. This milestone represents a fundamental shift: geospatial data has graduated from a specialized tool for analysts to an essential public utility. From the granular precision of Quality Level 1 (QL1) lidar to the tracking of housing density and infrastructure resilience, location intelligence is now a critical component of life in Vermont.

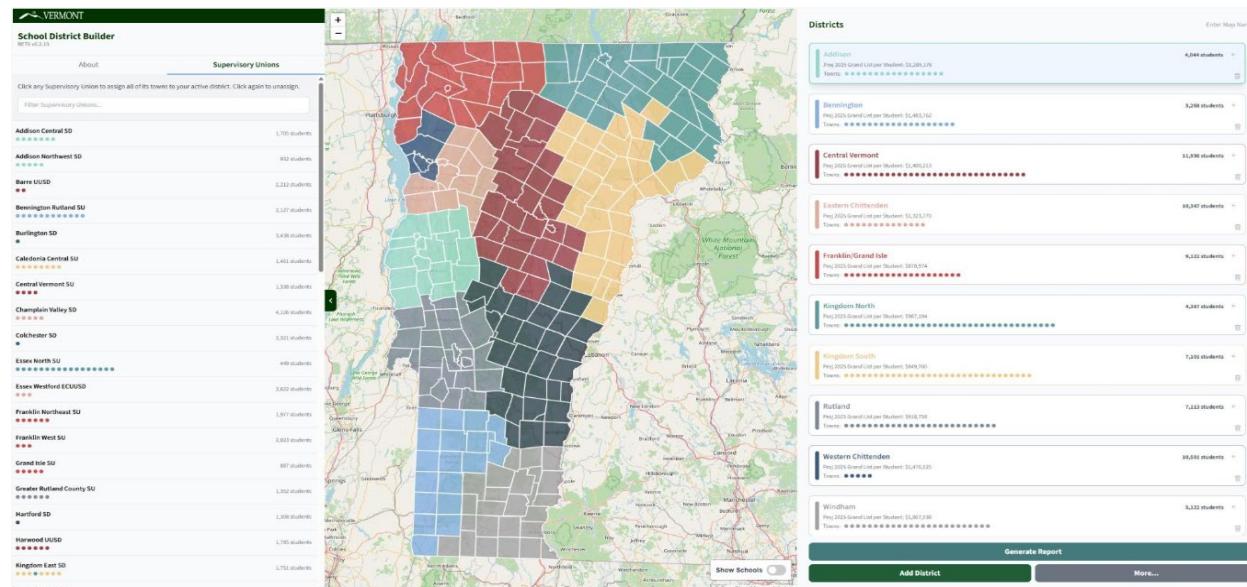
Year in Review featuring 40 examples of how GIS is being used across state agencies and regional partners in Vermont: <https://map.vermont.gov/review/2025>

## Improving the User Experience: Enabling Transparent, Data-Driven Education Reform for Vermonters

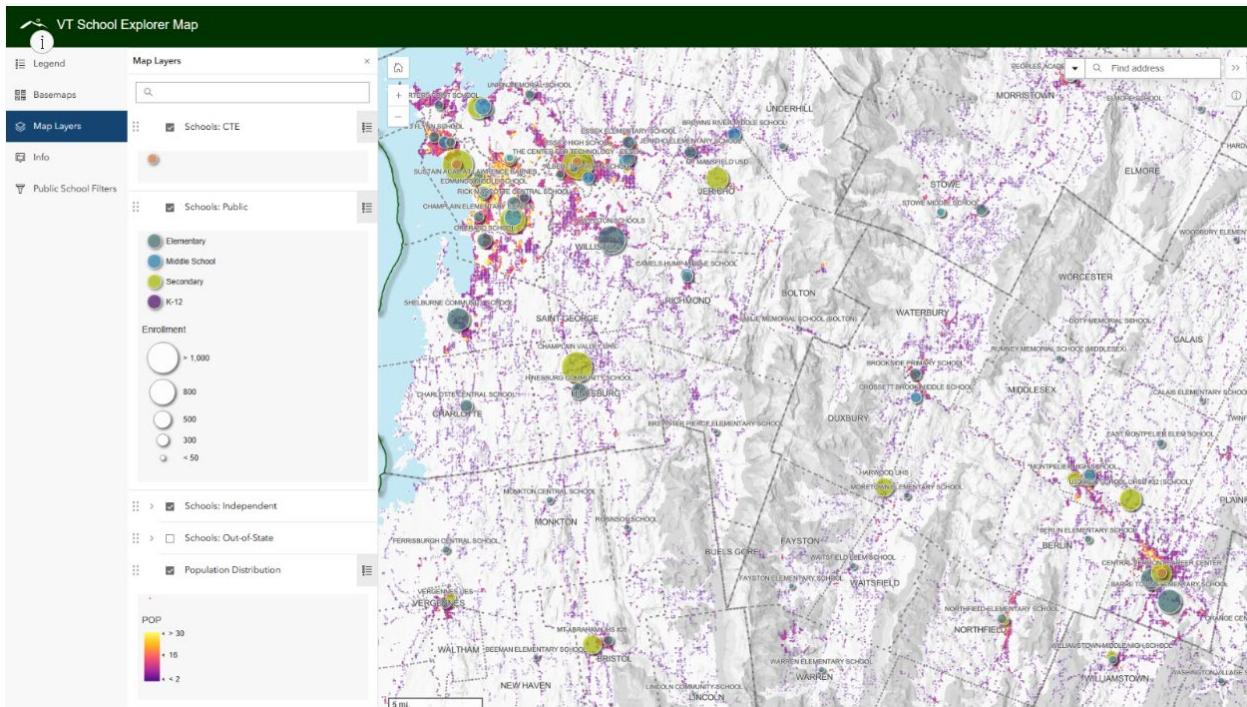
Act 73 of 2025 launched a major effort to rethink Vermont's public education system, focusing on improving equity, efficiency, and long-term sustainability. In direct support of this work, ADS developed a comprehensive, publicly accessible mapping and planning platform to help Vermonters, legislators, and state leaders clearly understand the impacts of potential school district changes. Built on open-source technology to promote transparency and trust, the tools bring together multiple datasets in a single, easy-to-use environment that allows users to explore trade-offs, test ideas, and view the system from multiple perspectives.

Key components of this effort include the **School District Builder**, which enables users to create and compare custom district scenarios and automatically generate reports on required metrics, such as student counts and average daily membership. The **School Explorer** offers an interactive map of existing schools, featuring layered data on population, jobs, terrain, and taxing capacity that help users visualize how geography and resources intersect. The **Drive Time Explorer** further supports equity-focused planning by illustrating the distance communities must travel to reach schools, making the impacts of access and transportation clear. Together, these tools strengthened data-informed decision-making and helped ground a complex, statewide education reform discussion in shared facts and accessible analysis.

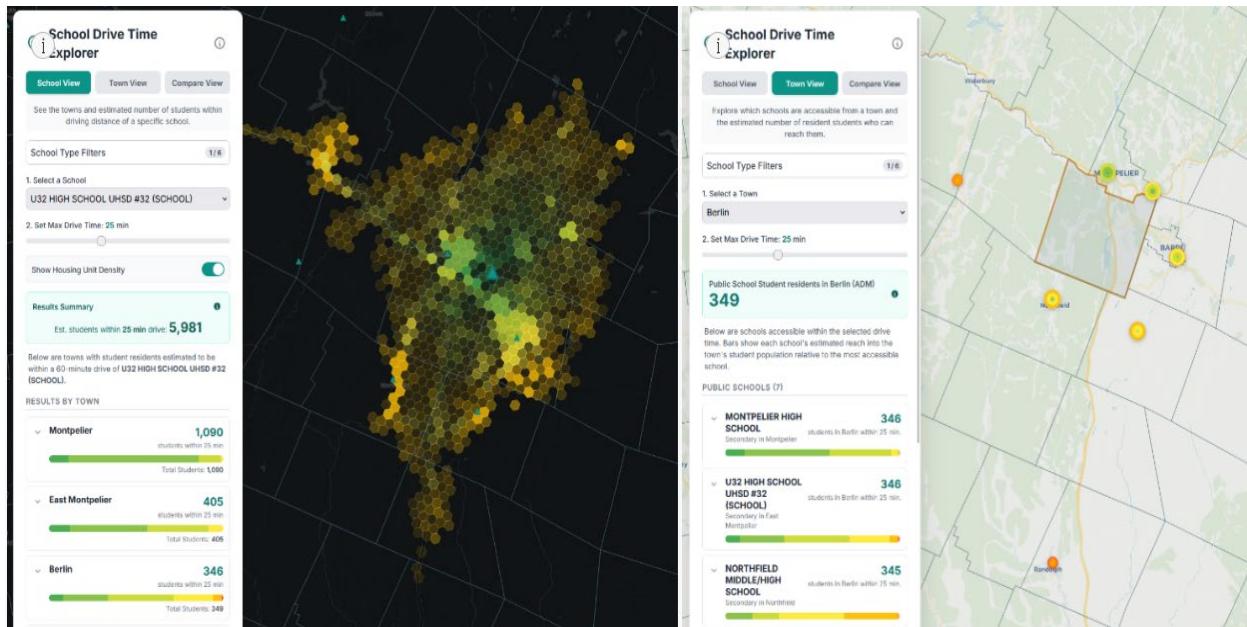
**School District Builder:** <https://map.vermont.gov/education/district-builder/>



## School Explorer: <https://map.vermont.gov/education/school-explorer/>



## Drive Time Explorer: <https://map.vermont.gov/education/drive-time/>

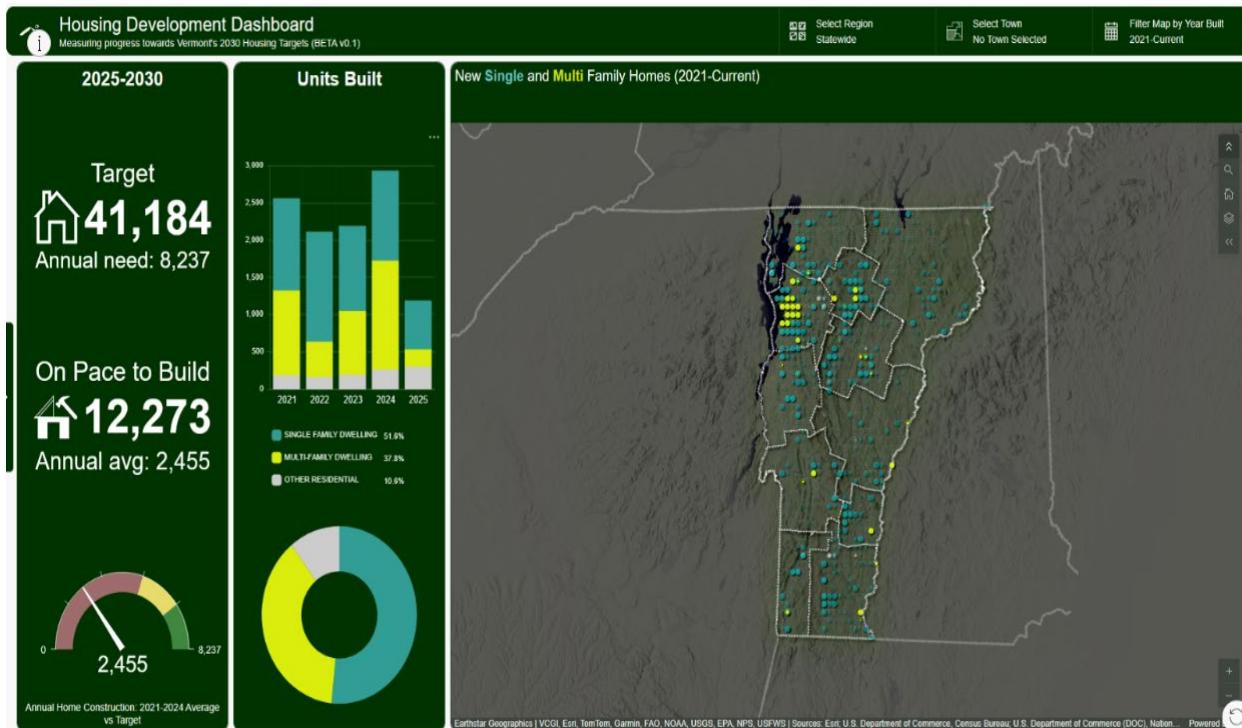


## Improving User Experience: Making Housing and Property Data Clear, Accessible, and Actionable

Recent legislative actions have heightened the need for clear and reliable insights into Vermont's property and housing landscape. In response, ADS and VCGI strengthened the state's data foundation and delivered new tools that help policymakers, communities, and the public better understand housing trends and progress toward legislative goals. In early 2025, VCGI launched a statewide housing dashboard to support the requirements of the HOME Act of 2023 and Act 181 of 2024. The dashboard provides a shared, statewide view of progress toward regional and statewide housing targets, while also highlighting where data gaps, challenges, and opportunities remain.

Supporting this work is Vermont's statewide parcel program, one of the most widely used and relied-upon spatial datasets in state government. In 2025, improvements were made to how parcel map updates from towns and their vendors are reviewed and reported, creating greater transparency around data quality and consistency. These enhancements strengthened a critical data asset that underpins numerous state programs and decision-making processes, ensuring more accurate, dependable property information for housing, planning, and policy efforts across Vermont.

**Housing Development Dashboard:** <https://housingdata.org/profile/home-building/dhcd-dashboard>



## Improving User Experience: Building an Accessible and Secure Digital Experience for All Vermonters

Over the past year, over 6.4 million US users have engaged with at least one of the State of Vermont's websites maintained by the Constituent Engagement Team. This has encompassed over 34 million page views, averaging roughly 95,000 per day over the year.

The most significant single effort undertaken by the Constituent Engagement team this year has been the establishment of a Universal Accessibility Initiative. The initiative aims to ensure that all digital content and services provided by the State of Vermont are accessible to all users, including those with disabilities. It focuses on implementing best practices for digital accessibility, providing training and resources to state employees, and fostering an inclusive digital environment across all state platforms and services. The initiative seeks to ensure compliance with the updated Department of Justice Guidelines, taking effect in April 2026, across our entire digital footprint.

The Constituent Engagement team also made investments in standardizing the delivery of new applications on our platform, including improvements to user experience, security, and data storage.

## Simplifying Systems: Modernizing Vermont's Data Infrastructure for Efficiency and Cost Savings

In 2025, the Data Services team took on statewide management of the data platform. This meant identifying, updating, and standardizing the configuration and management of hundreds of data servers. Over the next year, we will migrate those devices to lower-maintenance, cloud-native offerings, reducing overhead to maintain those capabilities.

Another significant initiative of 2025 was completing the foundational infrastructure for a statewide data lake House. Template-based and built to balance cost and capabilities, the Data Lake components offer rapid time-to-value and low-cost storage, while the Data Warehouse components offer data integrations and complex analytics. Combining these capabilities creates a "Data Lake House."

This next-gen data platform creates opportunities to deploy a shared responsibility model, in which agency data analysts and data stewards can co-create data management for their organization alongside ADS's data engineers. Establishing this shared responsibility model, process templates, and a data catalog is a primary activity for 2026. This work will enable strategic priorities from the legislative branch and policy initiatives from the executive branch to quickly begin to use data to support policy proposals and program development. ADS is taking lessons from several strategic initiatives this year that struggled to assemble the right data to inform how our next-gen data platform enables these efforts.

## Enhancing Statewide Standards: Establishing Privacy and Governance to Protect Vermonters' Data

In 2025, ADS established its first Privacy and Governance program within the Data and AI Office. The state hired a Director of Data Privacy, who works with agencies and departments to facilitate data sharing while preserving Vermonters' privacy. This program is brand new but has already been designed to maximize privacy preservation while complying with laws in response to federal requests, data sales regulations, and handling potential privacy incidents. Other key accomplishments include standard user access agreements for third-party users of state systems, a standard Criminal Justice Information System agreement to enhance the protection of active investigations, and the mitigation of hundreds of potential privacy issues through contracts.

## AWARDS RECEIVED IN 2025

The state of Vermont has been recognized for outstanding digital initiatives, earning multiple awards in 2025.

- **Center for Public Sector AI: [AI 50](#)** Award – Josiah Raiche was one of 25 individuals from across all levels of government and public sector-oriented businesses recognized for contributions to ethical AI adoption in government.
- **2025 Women Leading IT Award:** InfoTech – Denise Reilly-Hughes
- **National Association of State Chief Information Officers: [State Technology Innovator Award](#)** – Josiah Raiche
- **FBI CISO Academy at Quantico** – Fewer than 400 executives have been selected for attendance to this highly regarded (and classified) program since its inception in 2015 – John Toney
- **Davey Awards:** Gold, Vermont State Parks
- **MarCom Awards:** Gold, Vermont State Parks
- **Horizon Interaction Awards:** Silver Award for Government Agency Website – [Climate Change Vermont](#)

# STATUTORY REQUIREMENTS

The Agency of Digital Services is statutorily required by 3 V.S.A. § 3303 to provide the following data. The data collected helps our Agency, the Legislature, and others to understand the importance of coordination and investment in information technology for the State.

## Financial Report of Revenues and Expenditures for the Current Fiscal Year

| SFY2025 Revenues and Expenditures 07/01/25-12/31/25 |            |                                |       |                  |   |                            |                                |                         |                |                 |               |  |
|---|------------|--------------------------------|-------|------------------|---|----------------------------|--------------------------------|-------------------------|----------------|-----------------|---------------|--|
| Budget Period                                       | Dept       | Descr                          | Fund  | Budget As Passed | SFY25 Carry-Forward & Expense Carry-Forward | SFY25 PO Rollover Requests | SFY26 Excess Receipts Requests | One-Time Appropriations | Total Budget   | Expended Amount | Revenue       |  |
| 2026  | 1105500000 | Comm & Info Technology         | 10000 | 233,207.00       | 79.22                                       | -                          | -                              | -                       | 233,286.22     | 8,459.34        | -             |  |
| 2026  | 1105500000 | Comm & Info Technology         | 21328 | 14,128.00        | -   | -                          | -                              | -                       | 14,128.00      | -               | -             |  |
| 2026  | 1105500000 | Comm & Info Technology         | 21330 | 1,000,071.00     | -   | 162.56                     | -                              | -                       | 1,000,233.56   | 127,815.74      | -             |  |
| 2026  | 1105500000 | Comm & Info Technology         | 58100 | 133,014,361.00   | 14,029,817.33                               | 1,587,820.21               | -                              | 148,631,998.54          | 68,831,685.21  | 46,479,525.83   | -             |  |
| 2026  | 1105500000 | Comm & Info Technology         | 59300 | 3,467,808.00     | -   | 391,238.53                 | -                              | -                       | 3,859,046.53   | 1,829,171.61    | -             |  |
| 2026  | 1105892301 | ADS-Racial Justice Statistics  | 10000 | -                | 519,442.00                                  | -                          | -                              | -                       | 519,442.00     | 1,604.00        | -             |  |
| 2026  | 1105892302 | ADS-LIDAR Grant Match          | 10000 | -                | 81,766.98                                   | 811,143.79                 | -                              | -                       | 892,910.77     | 7,960.98        | -             |  |
| 2026  | 1105892302 | ADS-LIDAR Grant Match          | 21500 | -                | -   | -                          | 630,005.00                     | -                       | 630,005.00     | -               | -             |  |
| 2026  | 1105892303 | ADS-FY23 IT Initiatives        | 21951 | -                | 6,556.00                                    | -                          | -                              | -                       | 6,556.00       | -               | -             |  |
| 2026  | 1105892304 | ADS-ERP Financials             | 21951 | -                | 11,800,000.00                               | -                          | -                              | -                       | 11,800,000.00  | -               | -             |  |
| 2026  | 1105892305 | ADS-BGS Propman WIMS           | 21951 | -                | 940,300.52                                  | 80,262.52                  | -                              | -                       | 1,020,563.04   | 109,591.93      | -             |  |
| 2026  | 1105892306 | ADS-Fire Safety System         | 21951 | -                | 347,240.00                                  | 483,570.00                 | -                              | -                       | 830,810.00     | 504,615.20      | -             |  |
| 2026  | 1105892307 | ADS-AGO Case Management        | 21951 | -                | 1,991,446.22                                | 70,163.78                  | -                              | -                       | 2,061,610.00   | 50,224.00       | -             |  |
| 2026  | 1105892308 | ADS-DMV Core System Mod II     | 21951 | -                | 7,200,000.00                                | -                          | -                              | -                       | 7,200,000.00   | 7,200,000.00    | -             |  |
| 2026  | 1105892309 | ADS-DOL Unemployment Insurance | 21951 | -                | 22,916,865.00                               | 77,760.00                  | -                              | -                       | 22,994,625.00  | 1,671,208.00    | -             |  |
| 2026  | 1105892401 | ADS-Network & Security         | 21951 | -                | 8,771,780.66                                | 43,334.00                  | -                              | -                       | 8,815,114.66   | 716,054.34      | -             |  |
| 2026  | 1105892402 | ADS-Self-Exclusion Program     | 50250 | -                | -   | -                          | 35,432.00                      | -                       | 35,432.00      | -               | -             |  |
| 2026  | 1105892601 | ADS-Redistricting Task Force   | 10000 | -                | -   | -                          | -                              | 100,000.00              | 100,000.00     | -               | -             |  |
|   |            |                                |       | 137,729,575.00   | 54,575,397.38                               | 15,987,531.73              | 2,253,257.21                   | 100,000.00              | 210,645,761.32 | 81,258,390.35   | 46,479,525.83 |  |

## Summary of CY25 Independent Reviews

Per statute, ADS is required to hire an independent contractor to conduct an independent review of technology projects with total costs of over \$1 million. Additionally, we must provide summaries of each independent review conducted. The independent reviews must include an acquisition cost assessment, a technology architecture and standards review, an implementation plan assessment, a cost analysis, a benefit analysis model, an analysis of alternatives, an impact analysis of net operating costs for the agency carrying out the activity, and a security assessment. The Independent Review summaries can be found in the Information Technology Activity Report ([Independent Reviews | Enterprise Project Management Office \(vermont.gov\)](#)).

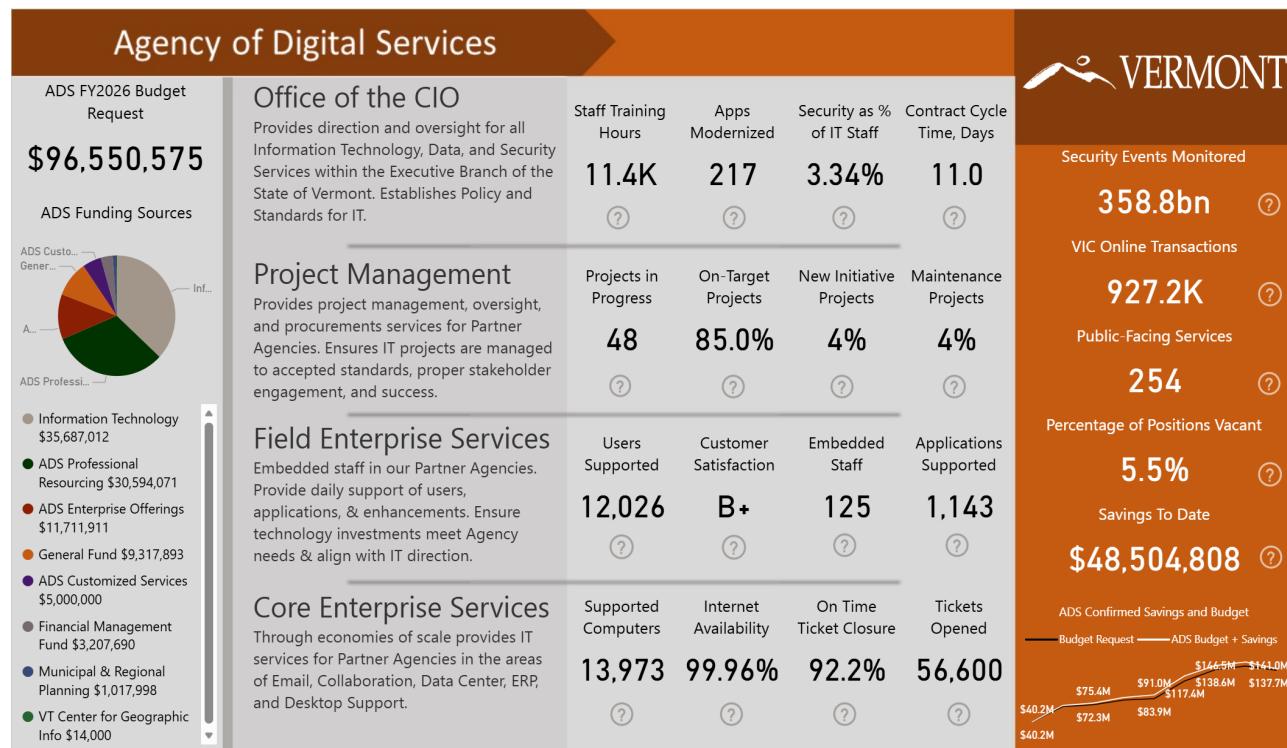
## Outline Summary of IT Projects Over \$500,000.00

The ADS Project Management Office continuously tracks data for all IT projects. Our agency is required to provide an outline summary of information, including scope, schedule, budget, and status for information technology projects over \$500,000.00. Highlighted in this report are projects that meet the \$500,000.00 threshold, as well as the top 10 IT projects chosen by the CIO. This information can be found in the Information Technology Activity Report

<https://digitalservices.vermont.gov/sites/digitalservices/files/documents/EPMO%20Annual%20Report%20-%20FY26.pdf>

## Agency Performance Metrics and Trends

To ensure successful Agency performance, our Agency constantly tracks data and metrics. The data includes baseline and annual measurements for each division.



## Costs Saved/Avoided as a Result of Technology Optimization

This requirement tasks the Agency of Digital Services to document the costs saved or avoided through technology optimization for the last calendar year. In this table, we have identified where our Agency saved or avoided costs due to technology modernization. The table below indicates the partner agency or department where savings occurred, the initiative name, and the total amount and frequency of the savings or cost avoidance.

| Agency/Department | Initiative  | Amount                 | Frequency |
|-------------------|---|------------------------|-----------|
| AOE               | Removal of VOIP Phones  | \$ 1,730.52            | Annual    |
| VDOL              | Removal of VOIP Phones  | \$ 507.12              | Annual    |
| AOE               | Removal of unused Salesforce licenses   | \$ 50,400.00           | Annual    |
| VDOL              | Removal of unused OnBase licenses   | \$ 73,548.75           | Annual    |
| CISO              | Renegotiated Tanium Contract  | \$ 99,043.67           | Annual    |
| CISO              | Cancellation of Tenable One   | \$ 83,506.00           | Annual    |
| CISO              | Cancellation of NUARI Contract for Yearly Table Top Excercises                              | \$ 65,729.00           | Annual    |
| CISO              | Cancellation of CrowdStrike   | \$ 300,939.00          | Annual    |
| VDOL              | Removal of 15 OnBase Servers no longer needed   | \$ 50,457.70           | Annual    |
| AOE               | Removal of 3 VMs from Azure Commercial  | \$ 2,561.48            | Annual    |
| AOT               | AOT HW Migration to Azure - Data Center Shutdown  | \$ 29,368.08           | Annual    |
| AOT               | AOT HW Migration to Azure - Data Center Shutdown  | \$ 2,561.33            | Annual    |
| AOT               | AOT HW Migration to Azure - Data Center Shutdown  | \$ 5,418.53            | Annual    |
| AOT               | Azure Reservations  | \$ 33,087.21           | Annual    |
| AOT               | OnPrem SQL Licensing - Migrated to Azure  | \$ 20,861.00           | Annual    |
| EPMO              | AHS DVHA Long Term Care Project   | \$ 34,250.00           | One Time  |
| GMCB              | Canceled project for a Document Storage Solution  | \$ 26,948.00           | Annual    |
| EPMO              | Reduced cost of IR  | \$ 5,000.00            | One Time  |
| AOT               | Cancel 19 G3 Licenses and change 14 others from G3 to F1                                    | \$ 92,119.00           | Annual    |
| AOA               | Retirement of Footprints Server - Migration to Ivanti                                       | \$ 4,385.00            | Annual    |
| AOT               | Switching CVO Compute to AZG Reserved Instances   | \$ 62,656.00           | Annual    |
| AOE               | Migrated Oracle databases to archive and SQL environment                                    | \$ 45,918.00           | Annual    |
| AOE               | shutting down fileservers with Sharepoint migration/VSMS                                    | \$ 33,505.00           | Annual    |
| AOE               | Ivanti for new computer deployment  | \$ 1,890.00            | Annual    |
| ADS               | Reduction of Staff Augmentation Costs in the DVHA Portfolio                                 | \$ 280,800.00          | Annual    |
| AOT               | Migration off RWIS SAN and subsequent shutdown  | \$ 3,300.00            | Annual    |
| AOE               | Consolidation of SQL Analysis and EDE environments  | \$ 7,050.00            | Annual    |
| AHS               | Cloud Hosting Savings post move of AHS servers to Azure                                     | \$ 407,000.00          | Annual    |
| VDOL              | Cancel IBM Service no longer needed with Move to Blue Hill                                  | \$ 33,189.00           | Annual    |
| VDOL              | Cancel Flex-ES System no longer needed with move to Blue                                    | \$ 23,300.00           | Annual    |
| AGR               | Upgraded to allow online self-service renewals and accept credit cards and ACH transactions | \$ 40,000.00           | Annual    |
| AGR               | Adobe InDesign/Acrobat License Savings  | \$ 572.04              | Annual    |
| AOE               | Cancelling Sifter Software License  | \$ 588.00              | Annual    |
| ADS               | VMWare Upgrade  | \$ 433,000.00          | Annual    |
| ADS               | Mulesoft Maintenance Costs - ADS negotiated savings of this                                 | \$ 30,000.00           | Annual    |
| ADS               | Switch WAN wave circuit   | \$ 48,000.00           | Annual    |
| ADS               | Microsoft Reseller Competition  | \$ 57,000.00           | Annual    |
| ADS               | Transition to LANDesk/Ivanti  | \$ 7,000.00            | Annual    |
| AOT               | Transition from Artemis to Wrke for AOT Construction  | \$ 216,000.00          | Annual    |
|                   | <b>Total for CY25</b>   | <b>\$ 2,713,189.42</b> |           |

## Report of Artificial Intelligence Inventory

The following is the inventory of Artificial Intelligence Systems currently identified by the Division of Artificial Intelligence as defined in and pursuant to 3 V.S.A. § 3305 b. The following elements are defined in the inventory. Please note that cost information is still being gathered and will be more complete in future reports.

|                             |  |
|-----------------------------|--|
| System Type                 | <p>The type of automated decision system:</p> <p><b>Rules-Based System:</b> Uses fixed, human-defined rules or logic; no adaptive learning.</p> <p><b>AI System:</b> Employs adaptive or reasoning-based algorithms (ML, generative, agentic) beyond fixed rules.</p> <p><b>Hybrid:</b> A composite system comprising elements of one or more other types.</p> <p><b>Other:</b> Uses non-adaptive statistical or algorithmic methods; not AI or rules-based.</p> |
| Purpose, Proposed Use       | a description of the purpose and proposed use of the automated decision system,  |
| Intended Benefits           | its intended benefits, including any data or research relevant to the outcome of those results   |
| Capabilities in use         | a description of the automated decision system's general capabilities  |
| Capabilities not in use     | reasonably foreseeable capabilities outside the scope of the agency's proposed use   |
| Makes independent decisions | whether the automated decision system is used or may be used for independent decision-making powers  |
| Decision impact type        | the impact of those decisions on Vermont residents   |
| Decision impact description | the impact of those decisions on Vermont residents   |
| Supported Decisions         | what decision or decisions it will be used to make or support  |
| Decision Type               | whether it is an automated final decision system or an automated support decision system   |
| Types of data inputs        | the type or types of data inputs that the technology uses  |
| Data source process         | how that data is generated, collected, and processed   |
| Types of data generated     | and the type or types of data the automated decision system is reasonably likely to generate   |

|                            |   |
|----------------------------|---|
| 3rd party bias test result | whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias   |
| Data storage               | how automated decision system data is securely stored and processed   |
| Data Sharing               | whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why   |
| Lifecycle cost             | a description of the IT fiscal impacts of the automated decision system, including initial acquisition costs and ongoing operating costs, such as maintenance, licensing, personnel, legal compliance, use auditing, data retention, and security costs |
| Cost savings               | any cost savings that would be achieved through the use of the technology   |
| Funding sources            | any current or potential sources of funding, including any subsidies or free products being offered by vendors or governmental entities   |

## AI System Report for Automotive Repository of Traffic Signs (ARTS)

| Vendor | State Entity using the System |
|--------|-------------------------------|
| UVM    | AOT                           |

### System Type: AI System

Purpose and proposed use: Identify traffic signs and geolocate them for an inventory

What decisions are to make or support: Support decisions for Project sign replacement, inventory management.

Intended benefits: Provide an up-to-date inventory of VTrans' roadside assets

General capabilities: Classify signs, track objects across monocular low frame rate imagery, estimate object distance and bearing from camera

Reasonably foreseeable capabilities outside the scope of current use: Could be trained for other roadside assets, like guardrail or pavement markings.

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                 | Data Generated or Outputs | Data Storage          |
|-----------------------------|---------------------------|-----------------------|
| Forward facing road imagery | Geolocated sign data      | Secure state database |

How those inputs are generated, collected, and processed: Images captured during annual surveys

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes, UVM to continue development.

## AI System Report for Pavement Condition Classification

| Vendor | State Entity using the System |
|--------|-------------------------------|
| Fugro  | AOT                           |

**System Type:** AI System

Purpose and proposed use: Classify pavement quality

What decisions are to make or support: Support decisions for Project prioritization and selection, funding requests.

Intended benefits: Provide up-to-date detailed pavement condition

General capabilities: Detect pavement quality from downward facing imagery

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                  | Data Generated or Outputs         | Data Storage          |
|------------------------------|-----------------------------------|-----------------------|
| Downward facing road imagery | Pavement segment condition rating | Secure state database |

How those inputs are generated, collected, and processed: Images captured during annual surveys

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes, in aggregates, with partners and the public.

## AI System Report for vRealize Operations

| Vendor | State Entity using the System |
|--------|-------------------------------|
| VMWare | ADS                           |

**System Type:** Other

Purpose and proposed use: Optimize performance and cost of State network and infrastructure

What decisions are to make or support: Support decisions for Incident response, device configuration.

Intended benefits: improve efficiency and lower cost

General capabilities: Monitor network health, recommend improvements in configuration

Reasonably foreseeable capabilities outside the scope of current use: Automatically make improvements in configuration

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Can adjust specs on servers and network components

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs         | Data Generated or Outputs                 | Data Storage  |
|---------------------|---|---------------|
| Computer usage data | Recommendations for better configurations | Vendor stored |

How those inputs are generated, collected, and processed: Monitored in real time on machines

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for CloudHealth

| Vendor | State Entity using the System |
|--------|-------------------------------|
| VMWare | ADS                           |

**System Type:** Other

Purpose and proposed use: Optimize performance and cost of State network and infrastructure

What decisions are to make or support: Support decisions for Incident response, device configuration.

Intended benefits: improve efficiency and lower cost

General capabilities: Monitor network health, recommend improvements in configuration

Reasonably foreseeable capabilities outside the scope of current use: Automatically make improvements in configuration

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Can adjust specs on servers and network components

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs         | Data Generated or Outputs                 | Data Storage  |
|---------------------|---|---------------|
| Computer usage data | Recommendations for better configurations | Vendor stored |

How those inputs are generated, collected, and processed: Monitored in real time on machines

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No.

## AI System Report for SecureState

| Vendor | State Entity using the System |
|--------|-------------------------------|
| VMWare | ADS                           |

**System Type:** Hybrid

Purpose and proposed use: Identify misconfigurations of cloud components

What decisions are to make or support: Support decisions for Cloud resource configuration.

Intended benefits: Improve the security posture of the state's IT infrastructure.

General capabilities: Monitor cloud service configurations

Reasonably foreseeable capabilities outside the scope of current use: No

### Impacts and Ethics

Impact of those decisions on Vermont residents: None

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs         | Data Generated or Outputs                 | Data Storage  |
|---------------------|---|---------------|
| Configuration files | Recommendations for better configurations | Vendor stored |

How those inputs are generated, collected, and processed: Extracted from connected resources

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Brainware

| Vendor | State Entity using the System |
|--------|-------------------------------|
| Hyland | ADS                           |

### System Type: AI System

Purpose and proposed use: Detect document types and extract data from them

What decisions are to make or support: Final decisions for Document classification.

Intended benefits: Improve efficiency of document management

General capabilities: Not yet in use

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Can classify and route documents

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                          | Data Generated or Outputs   | Data Storage          |
|--------------------------------------|-----------------------------|-----------------------|
| Documents routed to Brainware queues | Structured document content | Secure state database |

How those inputs are generated, collected, and processed: Scanned or digital documents are routed to Brainware based on expected type

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for OnBase OCR

| Vendor | State Entity using the System |
|--------|-------------------------------|
| Hyland | ADS, AOT, AHS                 |

**System Type:** Other

Purpose and proposed use: Digitize scanned documents

What decisions are to make or support: Support decisions for Document classification.

Intended benefits: Improve efficiency of document management

General capabilities: Optical Character Recognition

Reasonably foreseeable capabilities outside the scope of current use: In use in multiple agencies

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Converts images of documents into searchable, indexable documents

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                      | Data Generated or Outputs   | Data Storage          |
|----------------------------------|-----------------------------|-----------------------|
| Scanned documents queued for OCR | Searchable document content | Secure state database |

How those inputs are generated, collected, and processed: Documents like project design "magic boxes" are scanned and routed for OCR

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Okta Adaptive Authentication / Multifactor Authentication

| Vendor | State Entity using the System |
|--------|-------------------------------|
| Okta   | ADS                           |

**System Type:** Rules-Based System

Purpose and proposed use: Provide secure identity and access management

What decisions are to make or support: Final decisions for MFA prompt.

Intended benefits: Make robust authentication mechanisms less cumbersome for users

General capabilities: Adaptive Security, Bot detection

Reasonably foreseeable capabilities outside the scope of current use: No

### Impacts and Ethics

Impact of those decisions on Vermont residents: Direct. Prompts for MFA less frequently if the user is following known patterns.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs       | Data Generated or Outputs | Data Storage  |
|-------------------|---------------------------|---------------|
| User interactions | nan                       | Vendor stored |

How those inputs are generated, collected, and processed: Authentication workflows

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Land Cover Change Detection

| Vendor | State Entity using the System |
|--------|-------------------------------|
| UVM    | VCGI                          |

**System Type:** AI System

Purpose and proposed use: Identifies locations where land usage changes between surveys

What decisions are to make or support: Final decisions for Production of maps and land use statistics, policy making.

Intended benefits: Track changes in impervious surface and land use

General capabilities: Image processing, feature detection

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs    | Data Generated or Outputs            | Data Storage          |
|----------------|--------------------------------------|-----------------------|
| Aerial Imagery | Spatial data representing land areas | Secure state database |

How those inputs are generated, collected, and processed: Images are collected through annual surveys and processed

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for LIDAR Processing

| Vendor | State Entity using the System |
|--------|-------------------------------|
| N/A    | VCGI, AOT                     |

### System Type: AI System

Purpose and proposed use: Turns point clouds into 3d models of human and natural landscapes

What decisions are to make or support: Final decisions for Project planning.

Intended benefits: Improve mapping and project planning

General capabilities: Point cloud processing, feature detection

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs        | Data Generated or Outputs   | Data Storage          |
|--------------------|-----------------------------|-----------------------|
| LIDAR point clouds | Imagery and 3d spatial data | Secure state database |

How those inputs are generated, collected, and processed: LIDAR units are used to collect distance data

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Security Tools

| Vendor  | State Entity using the System |
|---------|-------------------------------|
| Vendors | ADS                           |

**System Type:** Not disclosed

Purpose and proposed use: Detect and stop intrusions, attacks, and malware.

What decisions are to make or support: Final decisions for identification, prevention, and resolution of security issues.

Intended benefits: Improve the security posture of the state's IT infrastructure.

General capabilities: Identify and resolve threats in real time. These systems' details are not recorded here to preserve the integrity of the capabilities of Vermont's security systems.

Reasonably foreseeable capabilities outside the scope of current use: Not disclosed.

### Impacts and Ethics

Impact of those decisions on Vermont residents: Direct. Containment and resolution of attacks.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Various

### Data Inputs, Outputs, and Security

| Data Inputs      | Data Generated or Outputs | Data Storage  |
|------------------|---------------------------|---------------|
| Security signals | Security Signals          | Vendor stored |

How those inputs are generated, collected, and processed: Collected through scans of machines and traffic

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes, the vendors collect heuristic aggregates and share them to improve security of all users.

## AI System Report for M365 Copilot

| Vendor    | State Entity using the System |
|-----------|-------------------------------|
| Microsoft | Multiple                      |

### System Type: AI System

Purpose and proposed use: Uses AI to assist employees in creating, summarizing, and analyzing content across Microsoft 365 applications (Word, Excel, PowerPoint, Outlook, Teams)

What decisions are to make or support: Support decisions for Content Development.

Intended benefits: Improves efficiency of standard office workflows such as research & content generation

General capabilities: Content Generation, Summarization of data & documents

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Preliminary content generation can shape subsequent considerations.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Yes, numerous tests have been performed highlighting the need for content review. Vermont's Generative AI Guidelines address this. Recent test: <https://www.sciencedirect.com/science/article/pii/S258975002300225X>

### Data Inputs, Outputs, and Security

| Data Inputs  | Data Generated or Outputs          | Data Storage  |
|--|------------------------------------|---------------|
| User prompts, user data & documents stored in Microsoft tenant | Document content, prompt responses | Vendor stored |

How those inputs are generated, collected, and processed: Prompts initiated by user, data and documents accessed via inherited user permissions through Graph API

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes

## AI System Report for Azure OpenAI

| Vendor           | State Entity using the System |
|------------------|-------------------------------|
| Microsoft/OpenAI | Multiple                      |

**System Type:** AI System

Purpose and proposed use: Assist with research and content generation

What decisions are to make or support: Support decisions for Content Development.

Intended benefits: Efficiency and quality of generated content

General capabilities: Content Generation

Reasonably foreseeable capabilities outside the scope of current use: Unknown

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Preliminary content generation can shape subsequent considerations.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Relies on GPT3.5, GPT4, and GPT4o which have been tested and found to have bias. Mitigation strategies are addressed in Vermont's Generative AI Guidelines.

### Data Inputs, Outputs, and Security

| Data Inputs                              | Data Generated or Outputs | Data Storage                          |
|--|---------------------------|---------------------------------------|
| user prompts, preprocessed documentation | Document content          | Stored in Vermont's cloud environment |

How those inputs are generated, collected, and processed: As specific usecases are developed, supporting background data sources are preprocessed to make them available to the model.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Azure AI Document Intelligence

| Vendor    | State Entity using the System |
|-----------|-------------------------------|
| Microsoft | Multiple                      |

**System Type:** AI System

Purpose and proposed use: Automatically extract information from tabular PDF documents

What decisions are to make or support: Support decisions for Determining information content of PDF forms and documents.

Intended benefits: Reduce task burden and manual workload for extracting information from PDF documents such as invoices and ingesting that data into other State of Vermont systems.

General capabilities: Optical character recognition, natural language processing, document parsing & layout analysis, custom model training & configuration

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Innacurate extraction without human review could lead State to collect incorrect information; use-case dependent.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Reduced reliability for documents with handwriting or poor scan quality

### Data Inputs, Outputs, and Security

| Data Inputs                                    | Data Generated or Outputs | Data Storage                          |
|--|---------------------------|---------------------------------------|
| PDF documents such as invoices and other forms | Document content          | Stored in Vermont's cloud environment |

How those inputs are generated, collected, and processed: Context dependent; data input to system by end user.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes, dependent on context.

## AI System Report for Contract Search

| Vendor                               | State Entity using the System |
|--------------------------------------|-------------------------------|
| Internally developed on Azure OpenAI | BGS/FRO                       |

**System Type:** Other

Purpose and proposed use: Assist municipalities with identifying relevant contracts they can use to support flood recovery.

What decisions are to make or support: Support decisions for Contract identification.

Intended benefits: Identification and reuse of contracts for flood recovery efforts

General capabilities: Intent-based search.

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Interprets intent and finds nearest matches.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Based on GPT3.5, but low risk of bias.

### Data Inputs, Outputs, and Security

| Data Inputs                     | Data Generated or Outputs | Data Storage                          |
|---------------------------------|---------------------------|---------------------------------------|
| User search, contract summaries | Search results            | Stored in Vermont's cloud environment |

How those inputs are generated, collected, and processed: Contracts are preprocessed for relevant details. User searches are converted to intent vectors and used to find matches.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Gen TAX

| Vendor | State Entity using the System |
|--------|-------------------------------|
| FAST   | AOA                           |

**System Type:** Rules-Based System

Purpose and proposed use: Identify fraud risk

What decisions are to make or support: Support decisions for Fraud determinations.

Intended benefits: Reduce successful fraud

General capabilities: Fraud risk scoring

Reasonably foreseeable capabilities outside the scope of current use: nan

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Flags returns as potentially fraudulent, holds for later processing.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs     | Data Generated or Outputs                 | Data Storage  |
|-----------------|---|---------------|
| Tax information | Recommendations for further investigation | State managed |

How those inputs are generated, collected, and processed: Tax information submitted is assigned a score.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for TestIM Test Automation Tools

| Vendor    | State Entity using the System |
|-----------|-------------------------------|
| Tricentis | ADS                           |

**System Type:** Rules-Based System

Purpose and proposed use: Automated regression testing of state websites and web apps

What decisions are to make or support: Support decisions for Release of updates to websites.

Intended benefits: Improved stability of interactive web content

General capabilities: Self-healing tests, streamlined test creation.

Reasonably foreseeable capabilities outside the scope of current use: nan

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Adapts to minor changes in the webpage.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                     | Data Generated or Outputs | Data Storage  |
|---------------------------------|---------------------------|---------------|
| Recorded tests, website content | Test results              | Vendor stored |

How those inputs are generated, collected, and processed: Tests are recorded and run, if they fail Testim tries to identify similar content to self-heal from small changes.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for ChatVT

| Vendor     | State Entity using the System |
|------------|-------------------------------|
| OpenAI/ADS | Multiple                      |

**System Type:** AI System

Purpose and proposed use: Assist with research and content generation

What decisions are to make or support: Support decisions for Content Development.

Intended benefits: Efficiency and quality of generated content

General capabilities: Content Generation

Reasonably foreseeable capabilities outside the scope of current use: Increased integration with other SoV applications and tools

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Preliminary content generation can shape subsequent considerations.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Relies on GPT4, which has been tested and found to have bias. Mitigation strategies are addressed in Vermont's Generative AI Guidelines.

### Data Inputs, Outputs, and Security

| Data Inputs                              | Data Generated or Outputs | Data Storage  |
|--|---------------------------|---|
| user prompts, preprocessed documentation | Document content          | All prompts, processing, and data in Vermont's cloud environment. |

How those inputs are generated, collected, and processed: As specific usecases are developed, supporting background data sources are preprocessed to make them available to the model.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for Modeling and Analytics

| Vendor  | State Entity using the System |
|---------|-------------------------------|
| Lockton | DHR                           |

**System Type:** Other

Purpose and proposed use: Evaluating medical and pharmacy benefits offerings

What decisions are to make or support: Support decisions for Pharmacy and medical benefit management.

Intended benefits: Help the state make more financially responsible decisions about medical and pharmacy benefit plan offerings

General capabilities: Modeling and analytics

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Inaccurate models could lead the state to budget inaccurately or pick a solution that doesn't meet the State's needs.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Unknown

### Data Inputs, Outputs, and Security

| Data Inputs                             | Data Generated or Outputs             | Data Storage   |
|---|---------------------------------------|--|
| State employee and insurance claim data | Predicted utilization and cost models | Lockton stores data in their data center and that of 3rd parties |

How those inputs are generated, collected, and processed: Data is deidentified and used to tune and update models for all Lockton customers.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Yes

## AI System Report for Everlaw AI Assistant

| Vendor  | State Entity using the System |
|---------|-------------------------------|
| Everlaw | AGO                           |

### System Type: AI System

Purpose and proposed use: Uses AI to help legal teams review and analyze large volumes of documents during litigation and investigations.

What decisions are to make or support: Support decisions for Legal arguments/rationale, development of litigation materials.

Intended benefits: Reduces manual effort, enabling attorneys to focus on case strategy and critical insights rather than document search/sorting.

General capabilities: The system applies natural language processing and machine learning to surface relevant information, suggest connections, and accelerate document review workflows.

Reasonably foreseeable capabilities outside the scope of current use: None

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Exposing inaccurate information or sources could have a material impact on litigation or reduce the credibility of the State.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Unknown

### Data Inputs, Outputs, and Security

| Data Inputs                                      | Data Generated or Outputs                               | Data Storage                       |
|--|---|------------------------------------|
| Litigation discovery data and relevant documents | Document insights, relevant entities, thematic clusters | Secure 3rd party cloud environment |

How those inputs are generated, collected, and processed: Case-specific documents uploaded by legal teams during litigation or investigations

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Supports exporting document sets and reports for court filings or client communication.

## AI System Report for Westlaw AI-Assisted Research

| Vendor  | State Entity using the System |
|---------|-------------------------------|
| Westlaw | AGO                           |

### System Type: AI System

Purpose and proposed use: Uses AI to assist legal professionals in conducting research by analyzing legal databases and delivering relevant case law, statutes, and secondary sources.

What decisions are to make or support: Support decisions for Legal arguments/rationale, development of litigation materials.

Intended benefits: Enable attorneys to focus on strategic analysis rather than document review.

General capabilities: The system applies natural language processing and machine learning to interpret queries, identify patterns, and suggest sources.

Reasonably foreseeable capabilities outside the scope of current use: nan

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Exposing inaccurate information or sources could have a material impact on litigation or reduce the credibility of the State.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Unknown

### Data Inputs, Outputs, and Security

| Data Inputs        | Data Generated or Outputs                 | Data Storage                             |
|--------------------|---|--|
| Case law databases | Search results, case summaries, citations | Proprietary Westlaw cloud infrastructure |

How those inputs are generated, collected, and processed: Proprietary legal databases maintained by Westlaw

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: nan

## AI System Report for ImageTrend AI Assist

| Vendor     | State Entity using the System |
|------------|-------------------------------|
| ImageTrend | AHS                           |

### System Type: AI System

Purpose and proposed use: Enable EMS crews to more easily and quickly capture patient information in emergency situations.

What decisions are to make or support: Support decisions for Recording of EMS patient data.

Intended benefits: Reduces task load and manual effort; improves data reporting quality/accuracy.

General capabilities: Voice dictation, image recognition

Reasonably foreseeable capabilities outside the scope of current use: No

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. If not reviewed, inaccurate information could have a negative effect on patient outcomes.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Unknown

### Data Inputs, Outputs, and Security

| Data Inputs   | Data Generated or Outputs | Data Storage                                     |
|---|---------------------------|--|
| Voice; image inputs such as ID, healthcare documents. | Patient care reports      | Temporary storage in vendor cloud infrastructure |

How those inputs are generated, collected, and processed: Data input on-scene at EMS events

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for GeoAI Tools

| Vendor | State Entity using the System |
|--------|-------------------------------|
| Esri   | Multiple                      |

### System Type: AI System

Purpose and proposed use: Spatially explicit AI techniques for detecting patterns, making predictions, and spatiotemporal forecasting.

What decisions are to make or support: Final decisions for Production of maps, policy making.

Intended benefits: Efficiency

General capabilities:

Reasonably foreseeable capabilities outside the scope of current use:

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs                     | Data Generated or Outputs | Data Storage          |
|---------------------------------|---------------------------|-----------------------|
| Raster and tabular spatial data | Spatial & tabular data    | Secure state database |

How those inputs are generated, collected, and processed:

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: No

## AI System Report for ARTICULATE AI ASSISTANT

| Vendor     | State Entity using the System |
|------------|-------------------------------|
| Articulate | AOT                           |

**System Type:** AI System

Purpose and proposed use: Aids VTrans Training Center in creating the audio content in Articulate 360, rather than recording when they are on tight turnaround times.

What decisions are to make or support: Final decisions for Audio generation.

Intended benefits: Efficiency

General capabilities: Audio Content Generation

Reasonably foreseeable capabilities outside the scope of current use: nan

### Impacts and Ethics

Impact of those decisions on Vermont residents: Indirect. Inaccurate audio generation could lead to false or misleading information in Articulate 360.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Unknown

### Data Inputs, Outputs, and Security

| Data Inputs          | Data Generated or Outputs | Data Storage  |
|----------------------|---------------------------|---------------|
| Training lesson text | Audio                     | Vendor stored |

How those inputs are generated, collected, and processed: Script of text to be converted to audio

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Potential sharing of trainings with municipalities

## AI System Report for DriveWyze Weigh Station Bypass System

| Vendor        | State Entity using the System |
|---------------|-------------------------------|
| DriveWyze IIS | AOT                           |

### System Type: Rules-Based System

Purpose and proposed use: Uses geofence to alert the drivers of CMVs, whose companies have registered for the Drivewyze program, to either pull in or bypass the open weigh station ahead. The alert is based upon carrier safety rating or pre-set pull-in percentage rates. The system pre-screens the CMVs, eliminating the need for carriers with a good safety record to pull into the weigh station.

What decisions are to make or support: Automated final decision system once the pull-in rate parameters have been set. decisions for Which carriers get the bypass or pull-in notification to the weigh station..

Intended benefits: Reducing the need of Inspectors to screen the CMVs of carriers with good safety ratings, reducing the wear and tear on CMVs when they pull into weigh stations, and reduce the fuel consumption that results from CMVs pulling into and stopping at the weigh stations.

General capabilities: The system provides Inspectors ahead at the open weigh station with the carrier safety rating of the CMVs that are approaching and entering the weigh station. The system advises carriers with a good safety rating to bypass open the weigh station.

Reasonably foreseeable capabilities outside the scope of current use: The data generated by the system is collected 24/7, even when weigh stations are not open. This assists in tracking violations and assists in targeted enforcement decisions.

### Impacts and Ethics

Impact of those decisions on Vermont residents: Greater percentage of carriers with low safety ratings are selected for inspection (results in safer roads), reduction in the amounts of fuel consumed by CMVs that receive a bypass notification (decrease in transportation-related pollution and greenhouse gas emissions). Safer roads and less pollution.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs  | Data Generated or Outputs  | Data Storage            |
|--|--|-------------------------|
| A driver cellphone triggers a hit at the geofence (approximately 1 mile from open weigh station). That hit starts a query to the SAFER/PRISM central site. | Data generated is the carrier's SAFER safety rating (Inspection Selection System). | Vendor stored (AWS Gov) |

How those inputs are generated, collected, and processed: The carrier information is queried to the SAFER/PRISM central site. Information is then sent to the state's established CVIEW

platform and the based upon the carrier's safety rating, parameters dictate whether the CMV pulls in or bypasses.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Vehicle count and weight data will be shared with the Agency of Transportation and FHWA. Automated decision system data for inspection selection will not be shared.

## AI System Report for DriveWyze SRIS- Smart Roadside Inspection System

| Vendor        | State Entity using the System |
|---------------|-------------------------------|
| DriveWyze IIS | AOT                           |

### System Type: AI System

Purpose and proposed use: Uses WIMS, US DOT number readers, and tire anomaly sensors to pre-screen CMVs prior to weigh stations. These technologies provide data of CMV weights, detect tire anomalies (flat tires, mismatched tires/bald tires), and CMV carrier safety ratings. This information is transmitted in real time to the Inspectors at the weigh stations ahead.

What decisions are to make or support: Automated support decision. Determination for selection for inspection ultimately made by the site coordinator who reviews the data from the system, verifies it upon contact with the CMV, and makes determination for inspection. decisions for Provides data which leads to deciding which carriers get selected for inspection.

Intended benefits: Reducing the need of Inspectors to screen the CMVs of carriers with good safety ratings, reducing the wear and tear on CMVs when they pull into weigh stations, and reduce the fuel consumption that results from CMVs pulling into and stopping at the weigh stations. CMV weight data is collected for every CMV that passes by the technology. Existing violations (weight/tire/motor carrier) are detected.

General capabilities: Provides Inspectors ahead at the open weigh station with the carrier safety rating of the CMVs, any tire defects/anomalies present, and weight of the CMV as it approaches the weigh station.

Reasonably foreseeable capabilities outside the scope of current use: The data generated by the system is collected 24/7, even when weigh stations are not open. This assists in tracking violations and assists in targeted enforcement decisions.

### Impacts and Ethics

Impact of those decisions on Vermont residents: Greater percentage of carriers with existing violations (tire violations and weight violations) or low safety rating scores are selected for inspection.. More efficient selection of CMVs- CMVs selected are the ones in violation.

Whether the automated decision system has been tested for bias by an independent third party, has a known bias, or is untested for bias: Not tested

### Data Inputs, Outputs, and Security

| Data Inputs   | Data Generated or Outputs   | Data Storage            |
|---|---|-------------------------|
| Vehicle weight data and tire anomaly data are generated for inground WIMs. The US DOT readers scan the sides of the CMVs and read the US DOT numbers. | Data generated is the carrier's SAFER safety rating (Inspection Selection System), CMV weight data, and tire anomalies present. | Vendor stored (AWS Gov) |

How those inputs are generated, collected, and processed: The CMV weight and tire anomaly data is generated from the WIMS and sent directly to the site coordinator at the weigh station. The carrier information generated from the US DOT reader is sent to the SAFER/PRISM central

site for a query. The resulting information from that query is then sent to the state's established CVIEW platform, and then it is transmitted to the site coordinator at the weigh station.

Whether an agency intends to share access to the automated decision system or the data from that automated decision system with any other entity, which entity, and why: Vehicle count and weight data will be shared with the Agency of Transportation and FHWA. Flat tire detection data will be shared with FMCSA in support of the program technology.



# Information Technology Activity Report

**Agency of Digital Services  
Enterprise Project Management Office  
(EPMO)**

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## About This Report

This report was produced by the Enterprise Project Management Office (EPMO), which is part of the Agency of Digital Services (ADS). The purpose of the report is to provide information regarding the performance of technology projects under the oversight of the EPMO and to provide a summary of independent reviews that were conducted during the reporting period.

This report is a point in time report and only includes information technology (IT) activities for the Executive Branch of State government and was compiled in collaboration with the State entities who have a qualifying project. Future costs and dates projected in this report are estimates based on current information and are subject to change. This report includes all IT Activities that have implementation costs occurring on or after July 1, 2018. IT activities are organized within this report by a State Agency/Entity.

### Project Status Categories

To ensure transparency and accountability in managing Vermont EPMO projects, we use a color-coded status system. This system provides a clear view of project health across three key dimensions: Scope, Schedule, and Budget. Each color signals the level of risk and the need for attention:

| <b>Quick Reference Chart:</b> |                |  |
|-------------------------------|----------------|--|
| <b>Color</b>                  | <b>Meaning</b> | <b>Action Required</b>                     |
| Green                         | Healthy status | Continue monitoring                        |
| Yellow                        | Moderate risk  | Investigate and address issues             |
| Red                           | High risk      | Escalate and implement corrective measures |

### Why This Matters

This system helps identify risks early and ensures timely corrective action.

Green projects are progressing as planned.

Yellow projects need attention to prevent escalation.

Red projects require immediate intervention and may impact delivery timelines or funding.

### Statutory requirements met in this report:

Vermont state statutes require the EPMO to provide information regarding technology projects under its oversight as follows:

#### **3 V.S.A. chapter 56 § 3303 (a)(4)**

(a)(4) an outline summary of information, including scope, schedule, budget, and status for information technology projects with total costs of \$500,000.00 or greater.

#### **3 V.S.A. chapter 56 § 3303 (d)(1)**

(d)(1) The Agency shall obtain independent expert review of any new information technology projects with a total cost of \$1,000,000.00 or greater or when required by the Chief Information Officer.

Independent Reviews completed from November 12, 2024, through December 31, 2025

| IT Activity Name |                                     |  |            |
|------------------|-------------------------------------|--|------------|
| Agency           | Department                          | Project  | Date       |
|                  | Cannabis Control Board              | VT Cannabis Control Board Phase 2 Project  | 11/12/2024 |
| Human Services   | Health                              | Medical Board Licensing (MBL) System Project   | 12/3/2024  |
| Digital Services |                                     | ADS Mainframe Hosting Project  | 12/12/2024 |
| Digital Services |                                     | Network Modernization Project  | 3/12/2025  |
|                  | Attorney General's Office           | Legal Case Management System   | 5/15/2025  |
| Human Services   | Department of Vermont Health Access | Medicaid Management Information System Interoperability & Patient Access Phase 2 Project   | 5/30/2025  |
| Human Services   | Department of Vermont Health Access | Medicaid Management Information System, Department of Corrections Justice Re-Entry Program | 7/7/2025   |
| Human Resources  | Department of Vermont Health Access | Vermont Health Connect Oracle Upgrade & Cloud Migration                                    | 11/17/2025 |

\*These independent reviews are available on our ADS EPMO website at [Independent Reviews | Enterprise Project Management Office \(vermont.gov\)](#) Note: Independent Reviews are not posted publicly until the subject vendor contracts have been fully executed.



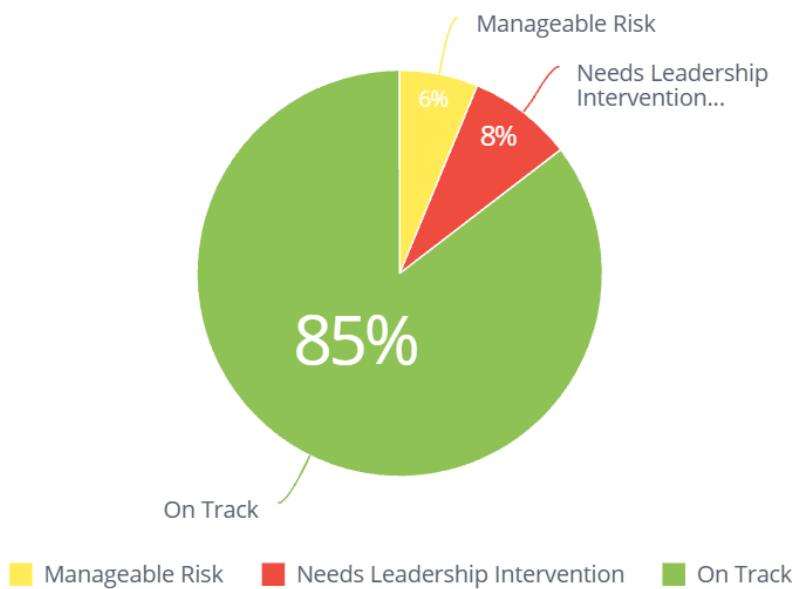
# Summary & Metrics

# Portfolio Summary & Metrics

The following pages of this report provide metrics related to the overall portfolio performance of projects across the Executive branch. This data is a point in time view of how the portfolio was performing as of March 25, 2025.

Overall, the projects managed by the EPMO are performing well with 68% on track according to the scope of work, the schedule and the budget estimated, 25% have risks that have been identified and are actively being managed by the project teams. 7% of all active projects are currently at risk and require leadership intervention. More details regarding individual project performance are available in the sections below.

## OVERALL PORTFOLIO STATUS



## SCHEDULE VARIANCE

Schedule variance is a term used in project management to describe the difference between how much work was planned to be completed by a certain time and how much work has been completed. In essence, schedule variance helps you understand whether you are ahead of schedule, on track, or behind schedule in completing your tasks or projects. Project managers regularly monitor schedule variance to ensure that the project stays on track and to adjust as necessary. The following is data related to how projects performed according to the schedule data captured by the State project teams.

|          |    |                 |    |                  |   |                          |     |
|----------|----|-----------------|----|------------------|---|--------------------------|-----|
| Projects | 48 | Active Projects | 48 | Overdue Projects | 7 | Task Completion Progress | 74% |
|----------|----|-----------------|----|------------------|---|--------------------------|-----|

## BUDGET VARIANCE

Budget variance in IT projects refers to the difference between the projected budget and the actual expenditure incurred during the project's lifecycle. This financial metric is crucial for project managers and stakeholders as it provides insights into the financial health and efficiency of a project.

Understanding budget variance helps in identifying areas where costs can be controlled or optimized, ensuring that resources are allocated effectively. It also aids in future project planning by highlighting potential risks and areas for improvement in budgeting practices. Effective management of budget variance is essential for the successful delivery of IT projects within the constraints of time, cost, and quality. The following charts provide information on how project budgets performed at an Enterprise level. More details regarding individual project budget performance are available in the detailed reports later in this report.

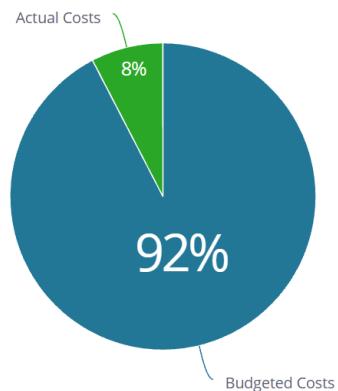
The EPMO is organized into three portfolios. EPMO 1, EPMO 4 and EPMO 5. Each portfolio is responsible for projects aligned to our customers.

### Budget to Actuals by Portfolio

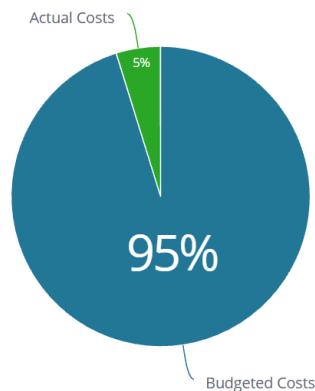
| EPMO Portfolio ID | Total Invoiced Cost | Total Budget Cost |
|-------------------|---------------------|-------------------|
| EPMO 1            | 39,027,444.96       | 473,372,763.74    |
| EPMO 4            | 31,818,857.43       | 634,842,362.83    |
| EPMO 5            | 17,486,377.11       | 273,885,462.55    |

- EPMO1 supports the Agencies of Administration, Digital Services, Education, and the Department of Labor.
- EPMO 4 supports the Agency of Human Services
- EPMO 5 supports the Agencies of Agriculture, Commerce and Community Development, Natural Resources, Public Safety, Transportation and other small departments, boards and commissions.

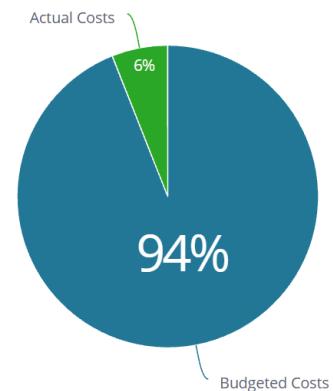
EPMO 1 Portfolio Budget to Actuals



EPMO 4 Portfolio Budget to Actuals



EPMO 5 Portfolio Budget to Actuals



## Total Estimated Implementation Costs

**\$422,376,886.82**

*Implementation costs are the one-time project costs to implement the solution. Includes both federal and state dollars.*

### Top 10 Projects for Highest Estimated Total Implementation Costs

| Rank | Entity           | Project   | Total Implementation Costs |
|------|------------------|---|----------------------------|
| 1    | Human Services   | AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)    | \$112,099,813.80           |
| 2    | Human Services   | AHS DVHA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS) | \$63,513,862.01            |
| 3    | Transportation   | AOT - DMV - Core Systems Replacement                              | \$51,210,563.00            |
| 4    | Administration   | AOA - Enterprise Resource Planning (ERP)                          | \$48,204,422.78            |
| 5    | Labor Department | VDOL - Unemployment Insurance Modernization                       | \$30,663,324.52            |
| 6    | Transportation   | AOT (VAMIS) Vermont Asset Management Information System.          | \$12,733,695.34            |
| 7    | Human Services   | AHS DCF CCWIS   | \$9,496,708.00             |
| 8    | Human Services   | AHS IEE Noticing Solution   | \$8,681,593.08             |
| 9    | Administration   | AOA - BGS - eProcurement (VTBuys)                                 | \$8,587,093.00             |
| 10   | Transportation   | AOT - HD - Construction Management System (CMS)                   | \$ 6,262,477.99            |

## Total Estimated Operational Costs

**\$318,387,755.93**

*Total costs to operate & maintain the solution through its life. Includes both federal and state dollars.*

### Top 10 Projects for Highest Estimated Operational Costs

| Rank | Entity           | Project   | Total Operational Costs | # Years |
|------|------------------|---|-------------------------|---------|
| 1    | Human Services   | AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)    | \$119,592,991.00        | 5       |
| 2    | Human Services   | AHS DHVA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS) | \$49,627,254.00         | 5       |
| 3    | Transportation   | AOT DMV Core Systems Replacement                                  | \$46,069,917.00         | 5       |
| 4    | Administration   | AOA Enterprise Resource Planning (ERP) Project                    | \$23,011,043.07         |         |
| 5    | Digital Services | ADS Network Modernization   | \$12,667,000.00         | 5       |
| 6    | Human Services   | AHS VHIE Maintenance & Operations – 2024                          | \$6,182,097.00          | 5       |
| 7    | Human Services   | ADS Mainframe Outsourcing RFP                                     | \$5,923,894.16          | 1       |
| 8    | Transportation   | ADS ACD Modernization   | \$5,534,369.00          | 5       |
| 9    | Transportation   | Vermont Asset Management Information System (VAMIS)               | \$4,685,468.33          | 8       |
| 10   | Digital Services | ADS Cloud Infrastructure Refresh                                  | \$4,588,455.00          | 5       |

## Total Estimated IT Activity Costs

**\$740,764,642.75**

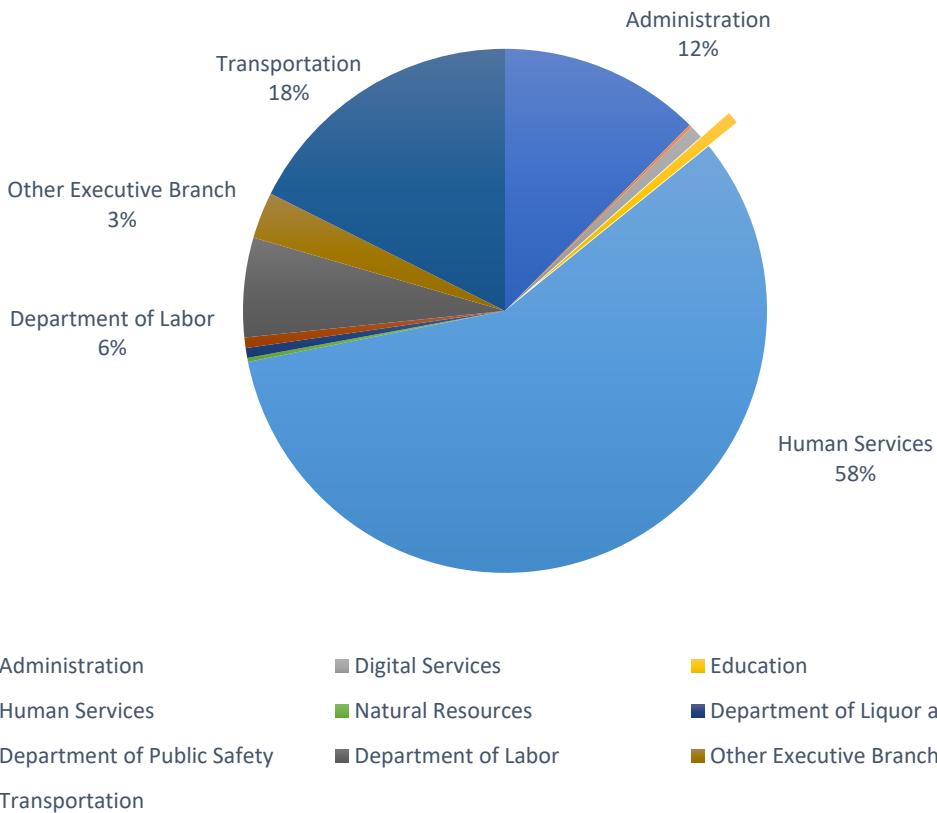
*Total IT Activity costs to implement, plus the costs to operate and maintain the solution.*

*Includes both federal and state dollars.*

### Top 10 Projects for Highest Estimated IT Activity Costs (Estimated Implementation + Estimated Operating costs)

| Rank | Agency         | Project   | Total IT Activity Costs |
|------|----------------|---|-------------------------|
| 1    | Human Services | AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)    | \$112,099,813.80        |
| 2    | Human Services | AHS DVHA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS) | \$63,513,862.01         |
| 3    | Transportation | AOT - DMV - Core Systems Replacement                              | \$51,210,563.00         |
| 4    | Administration | AOA - Enterprise Resource Planning (ERP)                          | \$48,204,422.78         |
| 5    | Labor          | VDOL - Unemployment Insurance Modernization                       | \$30,663,324.52         |
| 6    | Transportation | AOT (VAMIS) Vermont Asset Management Information System.          | \$12,733,695.34         |
| 7    | Human Services | AHS IEE Noticing Solution   | \$8,681,593.08          |
| 8    | Human Services | AHS DCF CCWIS   | \$9,496,708.00          |
| 9    | Transportation | AOT - HD - Construction Management System (CMS)                   | \$6,262,477.99          |
| 10   | Administration | AOA - BGS - eProcurement (VTBuys)                                 | \$8,587,093.00          |

### Cost % by State Sponsoring Entity



## PROJECT COMPLETIONS

The following IT projects successfully closed during this reporting period:

| Completed Projects in 2025                           | Completion Date | Successes  |
|--|-----------------|--|
| ADS ACD Modernization                                | 6/30/2025       | The Automatic Call Distribution (ACD) system provides the functionality for 14 call centers operated by state agencies. This project replaced the current on-premises system.  |
| AOE - Child Nutrition Management System              | 5/30/2025       | Implemented a new Child Nutrition Management System that replaced an existing legacy platform.   |
| AOT Wrike Implementation                             | 5/30/2025       | Implemented a configurable, cloud-based project scheduling and management solution for AOT infrastructure projects.  |
| SOS - Safe at Home                                   | 5/29/2025       | Implemented a system to support victims of domestic violence, sexual assault, and stalking, who have relocated or are about to relocate, in their effort to keep perpetrators from finding them  |
| DPS - Data Dashboard                                 | 5/16/2025       | Implemented a Criminal Justice Information System compliant data lake. Produced Heat Maps, Performance Metrics, Public Facing de-identified dashboards, Identify and Document Data Sources, Develop Data Quality and Governance Standards (Documentation), Interactive Dashboards available for public consumption.  |
| SOS - Business Filing System                         | 1/30/2025       | Implemented a full replacement of Vermont Secretary of State's business services platform, (including uniform commercial code and temporary officiant processing), positioning the business services application (Document Management and Electronic Filing System) towards software modernization, and incorporating cyber security compliance that addresses today's security risks. |
| DPS - VSP - Workforce Management Scheduling Solution | 10/1/2024       | Implemented scheduling software for all of Vermont State Police's (VSP) divisions and units to utilize that encompasses a wide range of functionality in scheduling and tracking employees' work hours.  |

|  |           |   |
|--|-----------|---|
| AOE - DMAD - Education Data Standard Ed-Fi         | 9/24/2024 | Implemented a platform to connect educational data systems. Implementation of the Ed-Fi standard and model at the state level streamlines collection from Local Education Agencies (LEAs) through an API process, standardized operational data store (ODS), and near real-time feedback loops for data quality checks.   |
| ADS - Windows 11 Upgrade                           | 3/28/2025 | Upgraded all State computer operating systems to Windows 11.  |
| ADS - Shared Services - VoIP                       | 3/19/2025 | Implemented an Enterprise IP telephony platform reaching across the State, enabling the State to support existing hosted VoIP environments.   |
| AOA - Vermont Business Portal                      | 8/13/2025 | Implemented a portal to provide a single point of entry for starting and operating a business in Vermont. The first phase of the project created a business navigator that connects new businesses with the appropriate agency and resources. The initial phase included resources from the Secretary of State (SOS), Department of Tax (Tax), Department of Labor (VDOL), and the Agency of Commerce and Community Development (ACCD). |
| AHS - CO Critical Incident Reporting HCBS Programs | 9/15/2025 | Implemented a critical incident reporting module for its HCBS programs across different departments to follow CMS rules.  |
| AHS - CO Refugee Resettlement Program              | 9/27/2025 | Implemented a centralized data system that collects refugee data including demographic and services data to be used by service provider partners and the State refugee office - primarily for data collection and reporting requirements for federal funders and for service coordination.  |

|  |           |  |
|--|-----------|--|
| AHS - DCF CDD Integrated Information System Phase 1      | 8/31/2025 | Developed a modular Case Management solution within its Salesforce platform resulting in enhanced case management processes, improved data sharing, and efficient collaboration among stakeholders, enabling the State of Vermont to effectively manage cases and provide quality services to its constituents   |
| AHS - VDH EDRS FHIR                                      | 5/23/2025 | The State implemented Fast Healthcare Interoperability Resources (FHIR) standards that define how healthcare information can be exchanged between different computer systems regardless of how it is stored in those systems. This will modernize death reporting between the Vermont Department of Health and CDC's National Centers for Vital Statistics System. This work will improve death reporting timeliness and overall data quality. Ultimately, this will help the CDC and the state recognize and track developing health threats. |
| AHS - VDH StarLIMS System Upgrade                        | 4/30/2025 | The project is successfully closed out, with the upgrade live and no reported issues. It has been completed under budget, with no remaining risks or resource constraints. The scope is finalized, and the project closed before the contract end date of 4/30/2025.   |
| AHS - VHIE Collaborative Services 2024                   | 6/1/2025  | Worked with the National Opinion Research Center (NORC) to develop a Social Determinants of Health (SDoH) Roadmap. The project included stakeholder engagement, landscape survey and needs assessment, training and education plan and implementation strategy. Project was completed 6/1/25   |
| AHS - VHIE Promoting Interoperability Program (PIP) 2024 | 6/30/2025 | Rural Health Transformation Program (RHTP): response to Notice of Funding Opportunity (NOFO)<br>Worked with Manatt Consulting to prepare the state's application for funding. The project involved working across multiple agencies and stakeholders and could result in up to 1B dollars in funding over the next   |

|   |           |   |
|---|-----------|---|
|   |           | 5 years addressing challenges facing rural health care in Vermont.  |
| AHS - VHIE - VHIE Connectivity 2024               | 6/30/2025 | Successfully advanced VHIE Connectivity by completing three Pilot projects in collaboration with the Vermont Department of Public Health: (1) Enabling recurring integration of health measurement, blood iron levels, and immunization data from the VHIE into the Women, Infants, and Children Nutrition Program (WIC) vendor's system on a recurring basis; (2) Integrating Vital Records, specifically adding Birth data; and (3) Expanding the Immunization Registry file provided by VDH to integrate immunization data beyond COVID immunizations.   |
| AHS - VHIE - VHIE Maintenance & Operations - 2024 | 6/30/2025 | Advanced HIE platform enhancement/upgrade efforts by completing the RFP and vendor evaluation process with VITL to identify a preferred HIE-as-a-Service solution, positioning the platform for modernization."   |
| AOT - DMV - Core Systems Replacement              | 12/1/2025 | The DMV Modernization project successfully delivered two major releases: Vehicle Services (VS) and Driver Services (DS). The VS release went live on November 13, 2023, and included enhancements such as vehicle titling, registration, renewals, impound records, dealer licensing and regulation, inventory management for plates and permits, and Point of Sale integration. The DS release, launched on November 12, 2025, focused on issuing and maintaining driver's licenses and IDs, supporting fraud detection and investigation, managing hearings and scheduling, and administering driver restrictions and improvements. Together, these releases modernized the DMV's core functions, enhancing service efficiency and effectiveness. |

|   |            |   |
|---|------------|---|
| AOT - HD - Construction Management System (CMS) | 11/14/2025 | The Construction Management System project successfully replaced multiple legacy systems, enhancing overall efficiency and functionality. Scope modifications were effectively managed through a structured Software Development Life Cycle (SDLC) process, which prioritized essential changes to meet business and functional requirements. The SDLC process was continuously refined, improving evaluation, approval, and implementation of scope changes. Despite schedule delays, the project stayed within the original contract amount. While the transition from Site Manager to iPD requires further effort, and Doc Express will continue to be used for document management, the project largely achieved its goal of modernizing construction management processes. |
| AOT - SharePoint Modernization                  | 5/23/2025  | Create a Modern SharePoint structure to which they migrate AOT files. Vendor will advise AOT on the structure and layout, and provide training/resources on how to use the functionality to best serve AOT employees.   |

## Annual Report Key

Below is the template used for the annual reports. Explanations for each field is provided in green font.

| IT ACTIVITY ANNUAL SUMMARY REPORT                                  |   |                                     |   |                                  |                                     |  |  |  |  |  |
|--|---|-------------------------------------|---|----------------------------------|-------------------------------------|--|--|--|--|--|
| Project Name   | Name of the IT Activity   |                                     |   |                                  |                                     |  |  |  |  |  |
| Agency/Department  | Name of the Requesting Agency/Department                            |                                     | Current Project Phase                                       | Phase                            |                                     |  |  |  |  |  |
| Original Project Start Date  | Start Date  | Original Project Estimated End Date | End Date  | Number of Change Orders Approved |                                     |  |  |  |  |  |
| Actual Start Date  | Actual Start Date   | Current Estimated End Date          | Current End Date  | Overall Status                   | Current Health (Red, Yellow, Green) |  |  |  |  |  |
| Project  | Status  |                                     | Update  |                                  |                                     |  |  |  |  |  |
| Scope  | Current Health (Red, Yellow, Green)                                 |                                     | Project status update as it relates to the project Scope    |                                  |                                     |  |  |  |  |  |
| Schedule   | Current Health (Red, Yellow, Green)                                 |                                     | Project status update as it relates to the project Schedule |                                  |                                     |  |  |  |  |  |
| Budget   | Current Health (Red, Yellow, Green)                                 |                                     | Project status update as it relates to the project Budget   |                                  |                                     |  |  |  |  |  |
| Overall  | Current Health (Red, Yellow, Green)                                 |                                     | Project status update as it relates to the project overall  |                                  |                                     |  |  |  |  |  |
| Scope Summary  |   |                                     |   |                                  |                                     |  |  |  |  |  |
| Summary of the project's scope of work and objective               |   |                                     |   |                                  |                                     |  |  |  |  |  |
| Schedule Summary   |   |                                     |   |                                  |                                     |  |  |  |  |  |
| Summary of the project's timeline to be completed and operational. |   |                                     |   |                                  |                                     |  |  |  |  |  |
| Budget Summary   |   |                                     |   |                                  |                                     |  |  |  |  |  |
| Total Original Estimated Implementation Cost                       | Total Current Estimated Implementation Cost                         |                                     | Budget Status – On Track, Over or Under Budget              |                                  |                                     |  |  |  |  |  |
| Total cost to implement the solution                               | Total Current cost to implement the solution                        |                                     | Indicators if performing on track, over or under budget     |                                  |                                     |  |  |  |  |  |
| Total Original Estimated Operating Cost                            | Total Current Estimated Operating Cost                              |                                     | Budget Status – Over or Under Budget                        |                                  |                                     |  |  |  |  |  |
| Total cost to operate the solution through its life cycle          | Total Current cost to operate the solution through its life cycle   |                                     | Indicators if performing on track, over or under budget     |                                  |                                     |  |  |  |  |  |
| Total Original Estimated IT Activity Cost                          | Total Current Estimated State IT Activity Cost                      |                                     | Budget Status – Over or Under Budget                        |                                  |                                     |  |  |  |  |  |
| Total cost for the IT Activity (Implementation + Operating)        | Total Current cost for the IT Activity (Implementation + Operating) |                                     | Indicators if performing on track, over or under budget     |                                  |                                     |  |  |  |  |  |
| Solution Lifecycle Years   | # of Years solution will be operating                               |                                     |   |                                  |                                     |  |  |  |  |  |



# Agency of Administration (AOA)

| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |  |   |           |
|------------------------------------|---|--|--|---|-----------|
| <b>Project Name</b>                | AOA - BGS - eProcurement (VTBuys)                             |  |  |   |           |
| <b>Agency/Department</b>           | Agency of Administration (AOA) Buildings and General Services |  | <b>Current Project Phase</b>   |   | Execution |
| <b>Original Project Start Date</b> | 7/4/2018  | <b>Original Project Estimated End Date</b> | 12/31/2025   | <b>Number of Change Orders Approved</b> | 16        |
| <b>Actual Start Date</b>           | 10/7/2019   | <b>Current Estimated End Date</b>          | 12/31/2025   |   |           |
| <b>Project</b>                     | <b>Status</b>   |  | <b>Update</b>  |   |           |
| Scope                              | <b>MANAGEABLE RISKS</b>                                       |  | The minimum viable product of the system was delivered and is now live. A new scope of work was approved under a change order. This work included streamlining the purchase requisition and invoice workflows to improve end-to-end processing, reduce cycle times and drive efficiencies in the procurement process. This work was completed and deployed to production on 11/10/2025. Work also concluded on improving the sourcing and contracting workflows. The release also included enhancements to the Procurement Advisory Team approval process effective 12/17/25. A plan to complete the remaining, undelivered scope is under negotiation between the State and the solution provider as part of a long-term maintenance and operations agreement. That scope includes completing work to bring the system into compliance with federal Accessibility rules, remediation of findings detected during the penetration vulnerability testing completed in the summer of 2025 and design/configuration of the State's Purchase Order rollover process which is critical for year end close out. Not timeline for completing the undelivered scope has been determined pending the completion of the new agreement. |   |           |
| Schedule                           | <b>MANAGEABLE RISKS</b>                                       |  | The system went live on 7/21/2025. Additional scope including streamlining the purchase requisition and invoice workflows to improve end-to-end processing, reduce cycle times and drive efficiencies in the procurement process was completed and deployed to production on   |   |           |

|                |                                     |   |
|----------------|-------------------------------------|---|
|                |                                     | 11/10/2025. Work concluded on improving the sourcing and contracting workflows on 12/17. HyperCare has been extended an additional month to allow BGS to negotiate a long term M&O agreement with KPMG therefore delaying project closeout.   |
| <b>Budget</b>  | <b>NEEDS LEADERSHIP INTEVENTION</b> | Overall, the project is trending over budget by 58% or \$4,610,945.11. Costs are expected to continue to increase as the State negotiates a new Maintenance and Operations agreement with the solution provider. Final costs will be documented in the project closeout report which is expected to be completed in early 2026. |
| <b>Overall</b> | <b>MANAGEABLE RISKS</b>             |   |

#### Scope Summary

The initial scope of the project envisioned delivering a Solution that would comprise full purchasing, sourcing, contracting and related processes with real-time integration to VISION and STARS at designated strategic points necessary to meet all State budget and financial management needs. The States' associated Functional Requirements are organized and presented below by the following procurement Workstreams.

- Need to Pay
- Catalog Capability
- Vendor Enablement/Management
- Sourcing/Bid Management
- Contract Management
- Spend/Data Analytics-Reporting

Due to repeated delays in the implementation plan for the project as described above, and the constraints on resources due to the extended duration of the project, some of the scope were de-prioritized and the team focused on delivering a minimum viable product to achieve a successful deployment in 2025. Minimum viable product (MVP) consisted of the following scope:

- Supplier Management
- Sourcing
- Contracting
- Purchase to Pay
- Analytics

The items that were part of the original scope and identified as out of scope for MVP in 2024 are as follows:

- Grants will not be moving into VTBuys and will be staying in VISION.
- Retainers will not be included in MVP –
- IT Retainers functionality is partially built without the backend financial integration for encumbering funds and requires additional development and testing before it can be deployed.
- P-Card Requirements and Design
- P-Card Reconciliation Requirements and Design
- Fiscal Year PO Rollover (This will need to be completed before June 30, 2026 for FY26 closeout).
- Spend Analytics
- Aware & WIMS Long Term Solution

In addition, the following work is required to be completed by Ivalua to ensure the system is fully compliant with Federal and State rules:

- Notification alert when uploading documents that contain potential malicious code – result of penetration testing. When this occurs, the documents are quarantined at the platform level (Ivalua) and not entered into VTBuys. Today, nobody is notified when this happens so documents including bid submissions could be lost and unaccounted for. The solution would be to let the submitter know that their document is flagged as suspicious so that they can follow up with OPC and/or resubmit.
- Accessibility requirements are not met. By April 2026 the system will need to ensure it is compliant with DOJ rules for accessibility.

#### Schedule Summary

The original schedule estimated completion of the project for July 2020. However, due to circumstances outside the control of the State and Vendor, the project experienced significant delays and multiple restarts. These circumstances included a pause due to the COVID-19 pandemic and 2 floods, one in 2023 and one in 2024. These events redirected state staff to address the emergency events and put the project on hold until resources were available to work on the project. The most recent re-baseline of the project schedule planned for a 7/1/2025 completion. The project further experienced a delay in deployment due to unexpected defects in the system and finally went live on 7/21/2025 with a rolling onboarding schedule for state agencies and departments to begin using the system. Additional scope was delivered in the Fall 2025 with the completion of workflow enhancements related to purchase requisitions, invoicing, sourcing, contracting, waivers and the PAT approval process completed in November and December 2025. The project closeout, originally scheduled for 12/31/2025, was delayed allowing BGS more time to negotiate a long-term maintenance & operations agreement with KPMG. Currently, closeout is scheduled for 1/31/2026

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost | Budget Status – On Track, Over or Under Budget |
|--|---|--|
| \$8,587,093                                  | \$8,587,093                                 | OVER BUDGET                                    |

| Total Original Estimated Operating Cost   | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
| \$1,785,000                               | \$1,785,000                                    | OVER BUDGET                          |
| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
| \$10,372,093                              | \$10,372,093                                   | OVER BUDGET                          |
| Solution Lifecycle Years                  | 5  |                                      |

## Schedule Variance chart and Budget to Actuals Chart

### AOA - BGS - VTBuys Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

1,280

% Over Schedule

244%

Schedule Estimates

### AOA - BGS - eProcurement (VTBuys) Budget Summary

Actual Project Costs through September 2024

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |  |   |           |
|------------------------------------|---|--|--|---|-----------|
| <b>Project Name</b>                | AOA - BGS - Workplace Information System (WIMS)               |  |  |   |           |
| <b>Agency/Department</b>           | Agency of Administration (AOA) Buildings and General Services |  | <b>Current Project Phase</b>   |   | Execution |
| <b>Original Project Start Date</b> | 12/19/2019  | <b>Original Project Estimated End Date</b> | 3/28/2026  | <b>Number of Change Orders Approved</b> | 27        |
| <b>Actual Start Date</b>           | 2/28/2021   | <b>Current Estimated End Date</b>          | 3/28/2026  |   |           |
| <b>Project</b>                     | <b>Status</b>   |  | <b>Update</b>  |   |           |
| <b>Scope</b>                       | <b>ON TRACK</b>   |  | The scope of the WIMS project is stable. With the exception a custom integration to pull in financial data, there is no indication that changes to project scope are expected. While not a current risk to the WIMS project, construction management software will be coming on line at a future date and will require integration with the new WIMS system.   |   |           |
| <b>Schedule</b>                    | <b>NEEDS LEADERSHIP INTERVENTION</b>                          |  | While progress in the WIMS project has been steady, it has been impacted by availability of internal stakeholders. Discovery of functionality when building custom integrations has also caused internal stakeholders to consider how we might better integrate systems that were not originally considered necessary to have WIMS functioning fully. This applies primarily to importing financial data into BGS projects that are managed in WIMS. |   |           |
| <b>Budget</b>                      | <b>ON TRACK</b>   |  | Project costs are aligned with calculations as depicted in the IT ABC form. Funds allocated specifically for custom integration development is limited but expected to be sufficient for the work that is currently in progress. Additional integrations, if deemed necessary, may require additional allocations for custom development.  |   |           |
| <b>Overall</b>                     | <b>ON TRACK</b>   |  |  |   |           |
| <b>Scope Summary</b>               |   |  |  |   |           |

The purpose of implementing the Workplace Information Management System (WIMS) to be able to understand the full life-cycle of BGS assets through documenting, compiling and analyzing facility conditions, maintenance activities, space usage and other data points to make informed decisions about capital investment, space allocation, and the general management of all our workspaces. As implementation of planned modules continues, custom integrations related to financial information may have their scope impacted by concurrent projects at the state.

#### Schedule Summary

The project was initiated in December of 2019 and is projected to wrap up in the second quarter of 2026. Implementation and custom development complexity as well as personnel availability have all impacted the original projected completion of 12/2024.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$2,781,671.14                               | \$2,781,671.14                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$814,040.89                                 | \$814,040.89                                   | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$3,595,712.03                               | \$3,595,712.03                                 | ON TRACK                                       |
| <b>Solution Lifecycle Years</b>              | <b>5</b>                                       |  |

## Schedule Variance Chart & Budget to Actuals Chart

BGS WIMS Schedule Variance Last refreshed Nov 24 2:1

### BGS WIMS Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative   |
|--|-------------------------|--------------------|------------------|--|
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 3/29/21            | 3/28/22          | Initial Schedule Estimate  |
| Baseline Schedule at Contracting             | Baseline at Contracting | 3/29/21            | 3/28/22          | Baseline at Contracting  |
| Estimate at Contract Amendment 3             | Baseline 3              | 3/29/21            | 3/30/26          | Baseline after Amendment 3   |
| Estimate at Contract Amendment 1             | Baseline 2              | 3/29/21            | 3/30/26          | After additional review of module implementation and assessing the need for custom integrations, contract Amendment #1 was written to include additional costs for custom integration development and to extend the implementation schedule. |

## BGS WIMS Budget Details

Actual Project Costs through September 2025

### Budgeted vs Actual Invoiced Implementation Costs

| Cost Category*                                   | Cost Type*  | Total Budget Cost | Total Invoiced Cost | Budget Remaining | % Budget Remaining |
|--|---|-------------------|---------------------|------------------|--------------------|
| Implementation                                   | ADS Enterprise Architect Staff for Implementation         | \$22,176.00       | \$19,800.00         | \$2,376.00       | 10.71%             |
|  | ADS EPMO Business Analyst for Implementation              | \$252,846.00      | \$191,557.50        | \$61,288.50      | 99.83%             |
|  | ADS EPMO Project Manager for Implementation               | \$465,943.20      | \$392,035.20        | \$54,908.00      | 12.29%             |
|  | ADS EPMO Project Oversight & Reporting                    | \$22,418.00       | \$14,600.00         | \$7,810.00       | 34.84%             |
|  | ADS Security Staff for Implementation                     | \$1,564.00        | \$1,188.00          | \$2,376.00       | 66.67%             |
|  | Hosting   | \$73,462.40       | \$73,462.40         | \$0.00           | 0.00%              |
|  | Independent Review  | \$17,769.00       | \$17,769.00         | \$0.00           | 0.00%              |
|  | Other Contracted Professional Services for Implementation | \$19,598.00       | \$19,598.00         | \$0.00           | 0.00%              |
|  | Other Costs   | \$440,624.51      | \$144,483.20        | \$296,141.31     | 67.21%             |
|  | Software/Licenses   | \$557,736.17      | \$350,736.17        | \$7,000.00       | 1.26%              |
| Vendor Annual Maintenance/Service Costs          |   | \$106,175.22      | \$106,175.22        | \$0.00           | 0.00%              |
| Vendor Implementation/Installation/Configuration |   | \$818,958.64      | \$638,924.38        | \$182,434.26     | 22.29%             |
| Grand Total                                      |   | \$2,781,671.14    | \$2,077,337.07      | \$704,334.07     | 25.32%             |

### Actual Implementation Costs by Cost Type



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |  |   |   |           |  |  |  |  |  |
|--|--|--|---|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | AOA - Enterprise Resource Planning (ERP) |  |   |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Administration (AOA)           |  | <b>Current Project Phase</b>  |   | Execution |  |  |  |  |  |
| <b>Project Sponsor</b>   | Sarah Clark/Denise Reilly-Hughes         |  |   |   |           |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 11/1/2021                                | <b>Original Project Estimated End Date</b> | 10/1/2025   | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 1/9/2025                                 | <b>Current Estimated End Date</b>          | 10/1/2028   |   |           |  |  |  |  |  |
| Project  | <b>Status</b>                            |  | <b>Update</b>   |   |           |  |  |  |  |  |
| Scope  | MANAGEABLE RISKS                         |  | The status of the scope of the project has manageable risk. At this stage, the risk level remains manageable. However, it is important to note that the testing scope and validation planning are contingent upon the readiness of configurations across various workstreams. We are closely monitoring potential delays, which may necessitate adjustments to the project scope or a resequencing of testing activities. To maintain alignment and ensure readiness for upcoming milestones, it is crucial to achieve clarity on the current status of configurations. |   |           |  |  |  |  |  |
| Schedule   | NEEDS LEADERSHIP INTERVENTION            |  | Ongoing configuration delays are impacting the timing and preparation for Unit Testing. These delays, compounded by dependency issues, necessitate further updates to our overall schedule. The lack of transparency regarding configuration status is hindering our ability to develop a credible and detailed recovery plan. As a result, future milestones will continue to be adjusted until we can validate configuration status and resolve existing dependencies. We are actively working to address these issues.   |   |           |  |  |  |  |  |
| Budget   | ON TRACK                                 |  | The baseline budget for the ERP implementation project has been established at \$53.3 million with \$8,865,045.70 spent through August 2025.  |   |           |  |  |  |  |  |
| Overall  | NEEDS LEADERSHIP INTERVENTION            |  |   |   |           |  |  |  |  |  |
| Scope Summary  |  |  |   |   |           |  |  |  |  |  |
| The State of Vermont is embarking on a transformative journey to replace its existing Human Capital Management system, CGI Vantage Budget system, and Finances VISION system. These systems, which are currently running on outdated mainframes, have reached the end of their life cycle. The State recognizes the need for a modern Enterprise Resource Planning (ERP) system that can meet the evolving needs of its departments and agencies. The goal of this project is to implement a |  |  |   |   |           |  |  |  |  |  |

brand new, modern ERP system that will bring about significant improvements in various areas. The State will embark on a business process transformation effort to improve processes and procedures for the implementation of a new ERP system. One of the key benefits will be enhanced customer service. The new system will provide a more user-friendly interface and improved functionality, enabling better service delivery to employees, managers, and other stakeholders. Employee self-service capabilities will empower individuals to access and manage their own information, reducing administrative burdens and improving overall efficiency. Reporting metrics will also be greatly improved with the implementation of the new ERP system. The system will provide real-time, accurate data that can be easily accessed and analyzed. This will enable better decision-making, strategic planning, and performance monitoring across departments and agencies. The State will have a comprehensive view of its financial and human capital data, allowing for more informed and data-driven decision-making. Data quality will be a key focus of the ERP project. The new system will ensure data integrity, accuracy, and consistency. By centralizing and automating various processes, the State will reduce the risk of errors and improve overall data quality. This will lead to better compliance, financial transparency, and accountability. Additionally, the implementation of the new ERP system will allow the State to sunset various on-premise, high-cost environments currently operational in its Data Centers. By moving to a modern, cloud-based infrastructure, the State will achieve cost savings, improved scalability, and enhanced security. This will free up resources that can be redirected towards other critical areas. In conclusion, the implementation of a new ERP system marks a significant milestone in the State of Vermont's journey towards modernization. By replacing outdated systems and embracing a modern, cloud-based infrastructure, the State is poised to improve customer service, reporting metrics, employee self-service, and data quality. This transformation will position the State for future success and enable better service delivery to its employees and stakeholders.

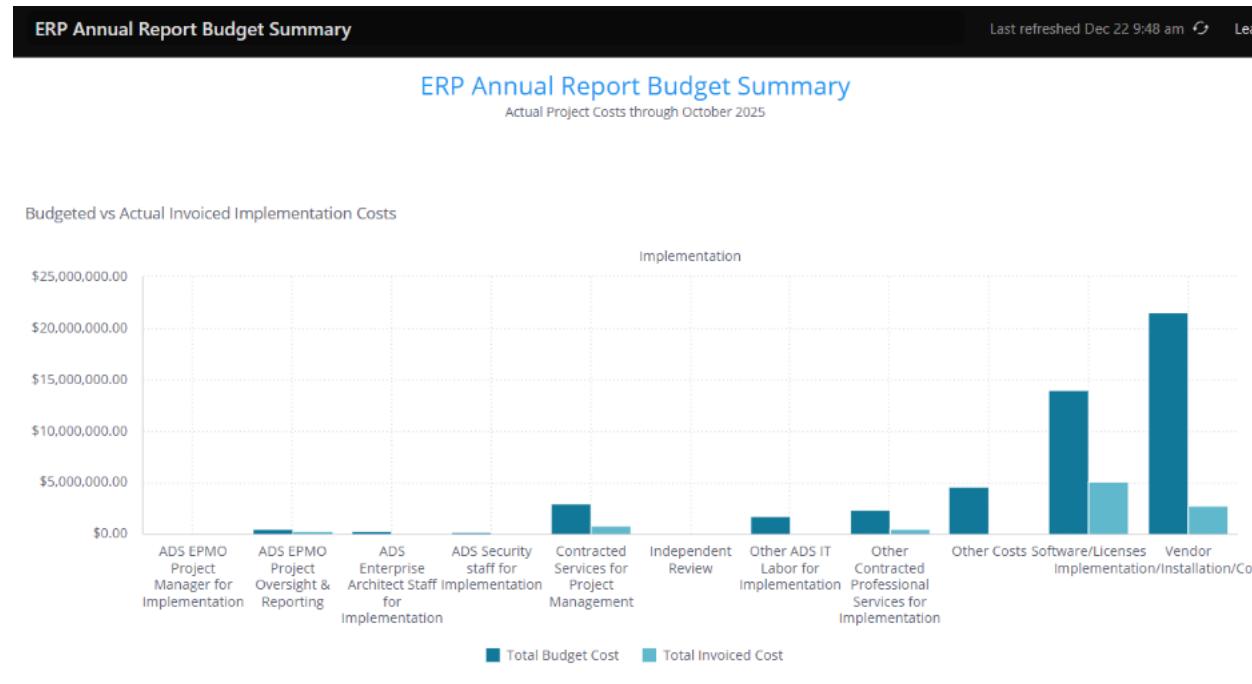
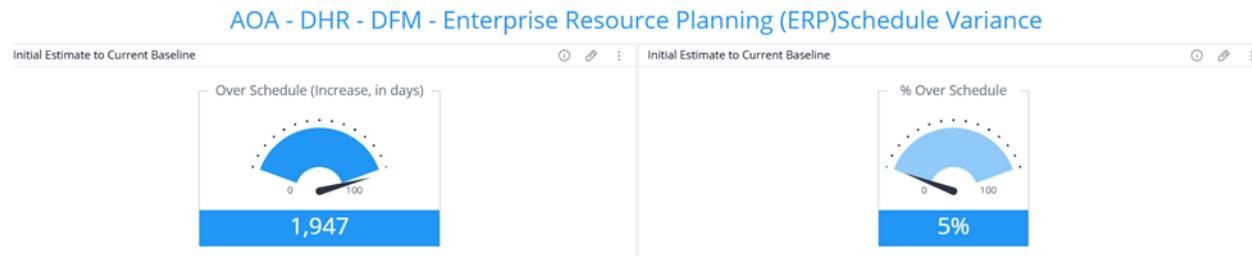
#### Schedule Summary

The ERP project is a multi-year initiative structured into two phases. Phase 1 focuses on the HCM Deployment, which is currently in the Architect and Configure phase. The go-live for HCM is scheduled for Summer 2026. Phase 2 will focus on the Financials implementation, scheduled to begin in Fall 2026 with an anticipated go-live in Summer 2028. The project as a whole is designed to modernize and integrate statewide systems through a coordinated, multi-year approach, ensuring a streamlined transition across all workstreams.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$45,050,066.78                              | \$48,204,422.78                                | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$4,450,831.41                               | \$23,011,043.07                                | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$49,500,898.19                              | \$71,215,465.85                                | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance Chart and Budget to Actuals Chart



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |  |  |   |           |  |  |  |  |  |
|--|--|--|--|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | AOA - Tax - Scanning, Capture, Imaging 2.0         |  |  |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Administration (AOA) Department of Taxes |  | <b>Current Project Phase</b>   |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 1/25/2022  | <b>Original Project Estimated End Date</b> | 1/26/2026  | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 3/3/2023   | <b>Current Estimated End Date</b>          | 1/26/2026  |   |           |  |  |  |  |  |
| <b>Project</b>   | <b>Status</b>                                      |  | <b>Update</b>  |   |           |  |  |  |  |  |
| <b>Scope</b>   | <b>ON TRACK</b>                                    |  | The baseline scope includes the replacement of the current scanning systems software that supports paper returns, payments and remittance processes. |   |           |  |  |  |  |  |
| <b>Schedule</b>  | <b>ON TRACK</b>                                    |  | The last of the four phases is scheduled to go live on January 12, 2026,   |   |           |  |  |  |  |  |
| <b>Budget</b>  | <b>ON TRACK</b>                                    |  | The baseline project budget has an implementation cost of \$2,204,520.00.  |   |           |  |  |  |  |  |
| <b>Overall</b>   | <b>ON TRACK</b>                                    |  |  |   |           |  |  |  |  |  |
| <b>Scope Summary</b>   |  |  |  |   |           |  |  |  |  |  |
| The Tax Department of the State of Vermont is modernizing its operations by replacing its outdated scanning system software, which has been in use for over 20 years. This initiative aims to enhance efficiency and effectiveness by developing four key components: • Document Capture will digitize paper returns, payments, and remittances, reducing manual data entry and errors, and speeding up processing. • Check Processing will automate the handling of checks, improving verification, depositing, and reconciliation processes to save time and resources. • Conversion will digitize existing paper documents, improving accessibility and reducing reliance on physical storage. • Content Management will create a centralized repository for all digital records, enhancing document retrieval, search, and sharing capabilities. Overall, this new scanning system will streamline processes, improve efficiency, and enhance tax administration, positioning the department for future success and better service to taxpayers. |  |  |  |   |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |  |  |  |   |           |  |  |  |  |  |
| Upon completion of vendor selection and contracting, a four Phase implementation schedule has been established. Phase 1 focused on vouchers, appeals, sales and use tax, meals and rooms tax, and both quarterly and annual withholding tax. It was successfully launched into production on August 20, 2024, Phase 2 focused on personal income tax, homestead declarations and renter credit claims. Go live date was 1/15/2025. Phase 3 addressed fiduciary income tax, estate tax, business tax account applications, property transfer tax, real estate withholding and uniform capacity tax. Released to production 7/8/25. Phase 4 (active) will handle checks  |  |  |  |   |           |  |  |  |  |  |

without initiating forms, return mail, correspondence without initiating forms, corporate income tax, business income tax and current use. Go live for the final phase targeted for 1/12/26.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$2,204,520.00                               | \$2,204,520.00                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,231,565.00                               | \$1,231,565.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$3,436,085.00                               | \$3,436,085.00                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts

### AOA Tax Scanning Capture Imaging Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

Initial Estimate to Current Baseline

% Over Schedule

0%

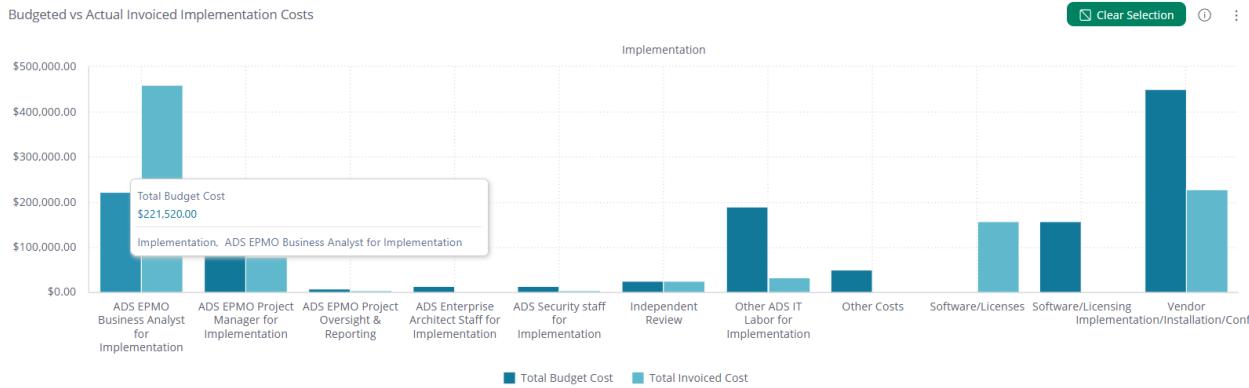
Schedule Estimates

| Estimate Name           | Estimate Stage          | Project Start Date | Project End Date | Change Narrative    |
|-------------------------|-------------------------|--------------------|------------------|---------------------|
| Estimate at Contracting | Baseline at Contracting | 1/25/22            | 1/2/26           | Project Version 2.0 |

### Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |                                     |   |                                  |           |  |  |  |  |  |
|--|---|-------------------------------------|---|----------------------------------|-----------|--|--|--|--|--|
| Project Name   | AOA - Tax - Vermont Property Information Exchange (VTPIE) |                                     |   |                                  |           |  |  |  |  |  |
| Agency/Department  | Agency of Administration (AOA) Department of Taxes        |                                     | Current Project Phase   |                                  | Execution |  |  |  |  |  |
| Original Project Start Date  | 4/6/2020  | Original Project Estimated End Date | 9/30/2025   | Number of Change Orders Approved | 5         |  |  |  |  |  |
| Actual Start Date  | 4/1/2020  | Current Estimated End Date          | 9/30/2025   |                                  |           |  |  |  |  |  |
| Project  | Status  |                                     | Update  |                                  |           |  |  |  |  |  |
| Scope  | MANAGEABLE RISKS  |                                     | Project scope has been relatively stable with regard to major deliverables. In some cases, however, there have been discussions regarding requested functions being out of scope as a result of requirements being vague and broad in some cases.   |                                  |           |  |  |  |  |  |
| Schedule   | NEEDS LEADERSHIP INTERVENTION                             |                                     | The project schedule currently at risk and a contract amendment to extend the implementation schedule is in process. Delays throughout the life of the project have caused a cascade of incomplete tasks to accumulate. Internal stakeholders are currently engaging with the vendor to determine how to ensure satisfactory delivery of all contractual obligations. |                                  |           |  |  |  |  |  |
| Budget   | ON TRACK  |                                     | Project costs have remained aligned with original estimates. Invoices are monitored closely by the project sponsor and business lead to ensure payment milestones are aligned with predicted costs.   |                                  |           |  |  |  |  |  |
| Overall  | NEEDS LEADERSHIP INTERVENTION                             |                                     |   |                                  |           |  |  |  |  |  |
| Scope Summary  |   |                                     |   |                                  |           |  |  |  |  |  |
| The State is required to maintain a statewide education grand list for the purposes of education property taxation, collecting Grand List data from each municipality. The VTPIE project aims to modernize processes, technology and tools to enable more efficiency creation and use of the grand list. |   |                                     |   |                                  |           |  |  |  |  |  |
| Schedule Summary   |   |                                     |   |                                  |           |  |  |  |  |  |

The original project scheduled estimated that implementation of new modules would take place from 2019 through 2022 with hosting, support and maintenance continuing through 2025. A contract amendment to extend the schedule for implementation. While this does not change the volume or scope of work, it ensures that both parties are following best practices while completing the implementation work.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$2,428,473.55                               | \$2,428,473.55                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,005,757.00                               | \$1,005,757.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$3,434,230.55                               | \$3,434,230.55                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Chart

### AOA - Tax - VTPIE Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

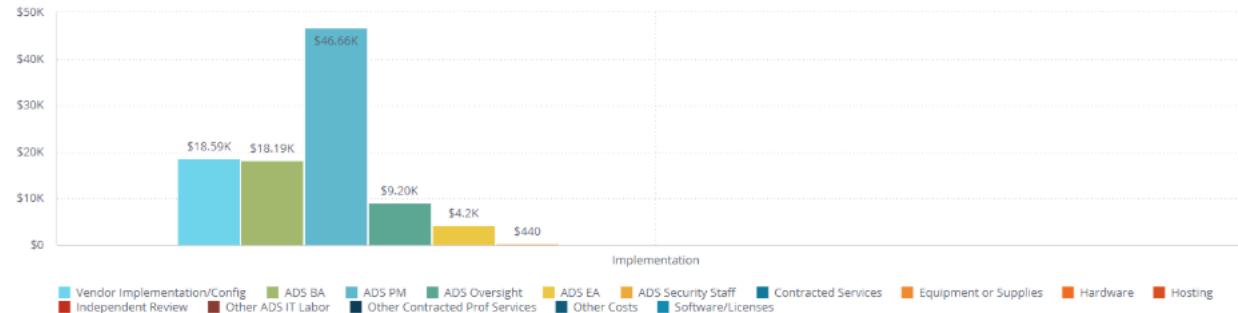
102

% Over Schedule

#N/A

Schedule Estimates

Actual Implementation Costs by Cost Type



| IT ACTIVITY ANNUAL SUMMARY REPORT |                                |                                     |  |                                  |         |
|-----------------------------------|--------------------------------|-------------------------------------|--|----------------------------------|---------|
| Project Name                      | AOA - Vermont Business Portal  |                                     |  |                                  |         |
| Agency/Department                 | Agency of Administration (AOA) |                                     | Current Project Phase  |                                  | Closing |
| Original Project Start Date       | 10/1/2024                      | Original Project Estimated End Date | 8/14/2025  | Number of Change Orders Approved | 0       |
| Actual Start Date                 | 9/12/2024                      | Current Estimated End Date          | 8/14/2025  |                                  |         |
| Project                           | Status                         |                                     | Update   |                                  |         |
| Scope                             | ON TRACK                       |                                     | <p>The scope is limited for the first iteration of the website. The initial scope is to connect potential business owners with State resources from SOS, VDOL, Tax, and ACCD. The scope has not changed since the initial discussions with business partners.</p>  |                                  |         |
| Schedule                          | ON TRACK                       |                                     | <p>There was no executed ITABC form for this project, however the ADS IT Service Request approval form estimated the cost of this initiative to be \$135,960.00</p> <p>The project was completed well within the estimated budget, coming in approximately \$98,946 under budget.</p> <p>Costs primarily involved ADS Resource Supports, with work conducted internally by the project team and business leaders from ACCD, VDOL, TAX, and SOS, along with our partner vendor, Tyler Technologies.</p> <p>Only internal ADS Resource costs were accounted for in this initiative.</p> <p>Current actual project costs are based on hours billed or coded to the VTBIZPORT TPID through August 1, 2025, totaling \$36,134.</p> <p>The Total Actual Costs identified for this project in this Close Out Report, of \$37,014.00, includes an estimate for an additional 10 hours needed to complete project close-out tasks, such as lessons learned surveys,</p> |                                  |         |

|   |   |  |
|---|---|--|
|   |   | drafting and finalizing the close-out report, and ensuring its full execution. |
| <b>Budget</b>   | <b>ON TRACK</b>                                       | This project completed within the estimated and approved preliminary budget.   |
| <b>Overall</b>  | <b>ON TRACK</b>                                       |  |
| <b>Scope Summary</b>  |   |  |
| The scope of this project is to build a business navigator (checklist) for potential business owners to connect with the appropriate State resources to assist them with starting a business in Vermont. The plan is to establish and launch a centralized website for users to access information associated with multiple state agencies across Vermont, to include, the Secretary of State, Vermont Department of Labor, Vermont Department of Tax, and ACCD. This project completed within the originally intended scope. |   |  |
| <b>Schedule Summary</b>   |   |  |
| This project completed on time with the Go/No Go decision for "go live" taking place on June 27, 2025. The public portal was launched on July 7, 2025.  |   |  |
| <b>Budget Summary</b>   |   |  |
| <b>Total Original Estimated Implementation Cost</b>   | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b>                          |
| \$140,580.00  | \$140,580.00  | <b>ON TRACK</b>  |
| <b>Total Original Estimated Operating Cost</b>  | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>                                    |
|   | 0   | <b>ON TRACK</b>  |
| <b>Total Original Estimated IT Activity Cost</b>  | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>                                    |
|   | \$140,580.00  | <b>ON TRACK</b>  |
| <b>Solution Lifecycle Years</b>   | 5   |  |

## Schedule Variance and Budget to Actuals Charts

AOA Business Portal Schedule Variance

Last refreshed 08/25/2023

### AOA Business Portal Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



Schedule Estimates

| Estimate Name                              | Estimate Stage | Project Start Date | Project End Date | Change Narrative   |
|--|----------------|--------------------|------------------|--|
| Updated Scheduled - Holiday Staff Outtages | Baseline 2     | 11/21/24           | 7/31/25          | Staff out of offices for the July 4th holiday, delayed deployment of the portal to go-live slightly. Go Live took place on 7/7/25, and close out are underway. |

### AOA Business Portal Better Budget Details

Actual Project Costs through September 2023

Budgeted vs Actual Invoiced Implementation Costs

| Cost Category* | Cost Type*  | Total Budget Cost | Total Invoiced Cost | Budget Remaining | % Budget Remaining |
|----------------|---|-------------------|---------------------|------------------|--------------------|
| Implementation | ADS Enterprise Architect Staff for Implementation | \$36,400.00       | \$7,414.00          | \$18,986.00      | 71.93%             |
|                | ADS EPIMO Business Analyst for Implementation     | \$17,600.00       | \$16,204.00         | \$1,396.00       | 7.89%              |
|                | ADS EPIMO Project Manager for Implementation      | \$8,800.00        | \$8,800.00          | \$0.00           | 100.00%            |
|                | ADS EPIMO Project Oversight & Reporting           | \$0.00            | \$0.00              | \$0.00           | 0.00%              |
|                | ADS Security staff for Implementation             | \$87,780.00       | \$12,516.00         | \$75,264.00      | 85.74%             |
|                | Other ADS IT Labor for Implementation             | \$140,580.00      | \$36,134.00         | \$104,446.00     | 74.39%             |
| Grand Total    |   |                   |                     |                  |                    |

Actual Implementation Costs by Cost Type





# Agency of Commerce and Community Development (ACCD)

| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |  |   |   |           |
|------------------------------------|--|--|---|---|-----------|
| <b>Project Name</b>                | ACCD Grants Management Solution  |  |   |   |           |
| <b>Agency/Department</b>           | Agency of Commerce and Community Development (ACCD) Department of Economic Development (DED)", "Department of Housing and Community Development (DHCD) |  | <b>Current Project Phase</b>  |   | Execution |
| <b>Original Project Start Date</b> | 9/1/2022   | <b>Original Project Estimated End Date</b> | 12/31/2026  | <b>Number of Change Orders Approved</b> | 5         |
| <b>Actual Start Date</b>           | 7/18/2024  | <b>Current Estimated End Date</b>          | 12/31/2026  |   |           |
| <b>Project</b>                     | <b>Status</b>  |  | <b>Update</b>   |   |           |
| <b>Scope</b>                       | <b>ON TRACK</b>  |  | The project team has contracted with Agate to implement their grants management IGX application replacing the current IntelliGrants 16 version to meet the scope defined by the Department of Economic Development (DED) and the Department of Housing and Community Development (DHCD).  |   |           |
| <b>Schedule</b>                    | <b>ON TRACK</b>  |  | Implementation Phase 1 started in August 2024, focusing on Municipal Planning Grants (MPG). Phase 2 will start in January 2025 and includes implementation of the Vermont Employment Growth Incentives (VEGI), Vermont Training Program (VTP), and the Vermont Community Development Program (VCDP) grants. Phase 3 is planned to commence in June 2025 to complete implementation of the VCDP grant program by December of 2026. |   |           |
| <b>Budget</b>                      | <b>ON TRACK</b>  |  | The project budget is currently baselined at \$1,181,661.48. Actual project costs through October 2025 \$609,011.   |   |           |
| <b>Overall</b>                     | <b>ON TRACK</b>  |  |   |   |           |
| <b>Scope Summary</b>               |  |  |   |   |           |

The State of Vermont is undertaking a significant upgrade to its grant management processes by transitioning from AGATE's IntelliGrants v16 to the more advanced IGX grants management application. This initiative focuses on enhancing the management of key programs, including the Vermont Community Development Program (VCDP), Vermont Training Program (VTP), Vermont Employment Growth Incentive (VEGI), and the Municipal Planning Grant (MPG) programs. The primary goal is to provide the Agency of Commerce and Community Development (ACCD) with a comprehensive and efficient grants management system.

The migration to the IGX application will offer the ACCD a suite of advanced tools designed to streamline the processing of both current and future grants. This transition will ensure effective management of the aforementioned programs by providing features tailored to their unique requirements. The new system will facilitate efficient handling of grant applications, fund disbursement, and project monitoring.

The implementation will adhere to design documentation approved by the ACCD, ensuring alignment with the agency's specific needs and workflows. This careful planning will guarantee a seamless transition and optimal use of the new software. The IGX application promises a modern, user-friendly interface, improved data management, and enhanced reporting capabilities, ultimately reducing administrative burdens and supporting better decision-making and oversight.

#### Schedule Summary

The initial IT ABC Form was submitted in July 2021 with an estimated go-live date of January 2024. Due to extended vendor proposal review and contracting activities, the start of the execution phase was delayed until August 2024. The current project schedule has an estimated project end date of September 2026.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,181,661.48                               | \$1,246,730.71                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$138,200                                    | \$138,200                                      | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$1,319,861.48                               | \$1,384,930.71                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

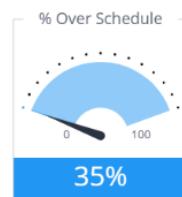
#### Schedule Variance and Budget to Actuals Chart

## ACCD - (GMS) Grants Management Solution - Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



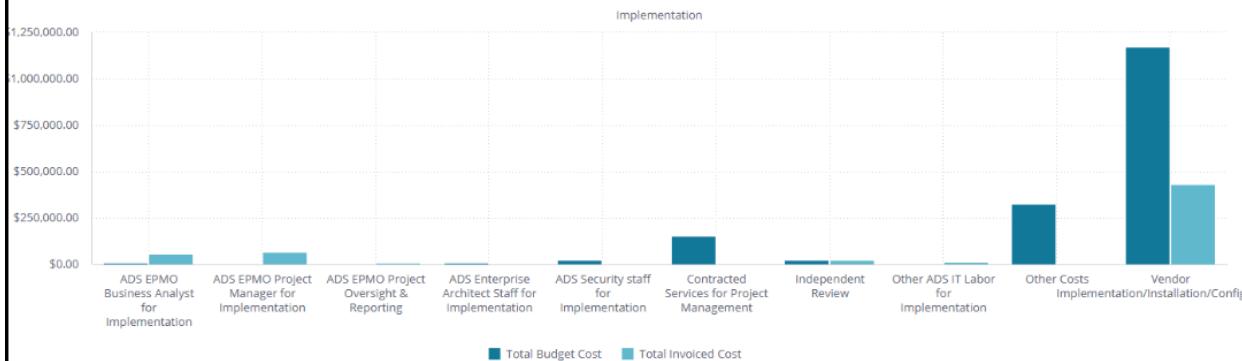
Schedule Estimates

| Estimate Name                                      | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|--|-------------------------|--------------------|------------------|---|
| Baseline 2 Change Request #1                       | Baseline 2              | 7/12/21            | 7/1/24           | Development of modules are rearranged from original schedule. End date is not changes           |
| Baseline 3 Change Request #2                       | Baseline 3              | 7/12/21            | 12/1/26          | Approved Change Request ADS Labor Charge 6.21.25, New End date of 12/1/26.                      |
| Baseline 4 Change Request #3                       | Baseline 4              | 7/12/21            | 12/1/26          | Approved Change Request ADS Labor Charge 10.7.25 (reallocate labor hour from unused labor line) |
| Estimate at Contracting Project Start-Finish Dates | Baseline at Contracting | 7/12/21            | 7/1/25           | Baseline at Contracting, Vendor contract approved with a rebaselined schedule.                  |
| Initial Estimated Of Project Start-Finish Dates    | Initial Estimate        | 7/12/21            | 12/31/21         | Initial Estimate, IT ABC Form Approved 7/16/2021  |
|  | Planning Estimate       | 7/12/21            | 3/31/25          | Planning Estimate, IT ABC Form Approved 3/24/2024   |
|  |                         |                    | 1/2/24           | Planning Estimate, IT ABC Form Approved 6/21/2024   |
|  |                         |                    |                  | Planning Estimate, IT ABC Form Approved 9/20/2022   |

## ACCD - (GMS) Grants Management Solution - Annual Report Budget Summary

Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs





# Agency of Agriculture Food & Markets (AGR)

**\*No IT Activities dollars to report this year**



# Agency of Digital Services (ADS)

| IT ACTIVITY ANNUAL SUMMARY REPORT  |                                  |                                     |   |                                  |         |  |  |  |  |  |
|--|----------------------------------|-------------------------------------|---|----------------------------------|---------|--|--|--|--|--|
| Project Name   | ADS - Apptio                     |                                     |   |                                  |         |  |  |  |  |  |
| Agency/Department  | Agency of Digital Services (ADS) |                                     | Current Project Phase   |                                  | Closing |  |  |  |  |  |
| Original Project Start Date  | 3/18/2024                        | Original Project Estimated End Date | 8/29/2025   | Number of Change Orders Approved | 0       |  |  |  |  |  |
| Actual Start Date  | 5/17/2024                        | Current Estimated End Date          | 8/29/2025   |                                  |         |  |  |  |  |  |
| Project  | Status                           |                                     | Update  |                                  |         |  |  |  |  |  |
| Scope  | ON TRACK                         |                                     | Following the project "Refresh", the scope has been identified with three phases called out. The project scope was cancelled before the full implementation of Phase 3 - Cloudability.  |                                  |         |  |  |  |  |  |
| Schedule   | ON TRACK                         |                                     | After initial implementation efforts of Apptio were stymied by the implementation sub-contractor, the project team had been working directly with Apptio to complete the basic Apptio functionality implementation before then turning to begin work on the additional functionality offered by the Apptio suite of products that was already paid for. With the cancellation of the project, the schedule is no longer of any concern. |                                  |         |  |  |  |  |  |
| Budget   | ON TRACK                         |                                     | With the Project JumpStart, the only budgetary concerns are labor costs, but the project team and stakeholders are actively reviewing these costs to ensure project success. The actual project costs totaled \$862,363.90, the vast majority of which was Apptio License Fees (\$783,691.90) and ADS labor costs (\$78,972.00).  |                                  |         |  |  |  |  |  |
| Overall  | ON TRACK                         |                                     |   |                                  |         |  |  |  |  |  |
| Scope Summary  |                                  |                                     |   |                                  |         |  |  |  |  |  |
| The Apptio Business Office Budget System Project is a key initiative aimed at transforming budgetary processes for Vermont's Business Office Department. This project seeks to implement a comprehensive and robust budget management system to enhance efficiency, accessibility, and effectiveness in managing the State of Vermont's budgets and financial reporting. |                                  |                                     |   |                                  |         |  |  |  |  |  |

The new system will replicate existing workflows and processes, allowing the Business Office to manage workloads efficiently, track progress, and ensure timely completion of budgetary reports. Additionally, the project will expand the capabilities of the budget and vendor management system, tailoring it to the department's specific needs and enhancing reporting and oversight capabilities.

By adopting this comprehensive system, the Business Office aims to improve collaboration, streamline processes, and increase transparency. The system will ensure that all relevant information is easily accessible and well-organized. Features such as Vendor Management and Cloudability will facilitate efficient tracking of budgetary processes and vendor relations, while enhancing inter-departmental communication to promote transparency and accountability. Robust reporting capabilities will provide valuable insights for analysis and decision-making.

Overall, the Apptio Budget Management System Project represents a significant advancement in streamlining and enhancing state budgetary processes for Vermont's Business Office Department. This initiative underscores the department's commitment to delivering efficient and effective financial and budgetary services to the citizens of Vermont.

#### Schedule Summary

The Apptio JumpStart project was canceled by the project sponsor and executive stakeholders on 8/26/25. The project Close Out Meeting and Report have been held and collected, and the project is now considered closed.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$865,971.90                                 | \$865,971.90                                   | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
|  | 0  | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
|  | \$865,971.90                                   | ON TRACK                                       |
| Solution Lifecycle Years                     | 4  |  |

## Schedule Variance and Budget to Actuals Charts

### Apptio Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



#### Schedule Estimates

| Estimate Name                                      | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|--|-------------------------|--------------------|------------------|---|
| Baseline at Contracting Project Start-Finish Dates | Baseline at Contracting | 3/18/24            | 4/30/25          | Schedule dates and costs changed due to executed contract.  |
| Initial Baseline                                   | Initial Estimate        | 4/3/23             | 8/15/23          | The initial baseline schedule for this project was not met, due to the execution of the contract. |

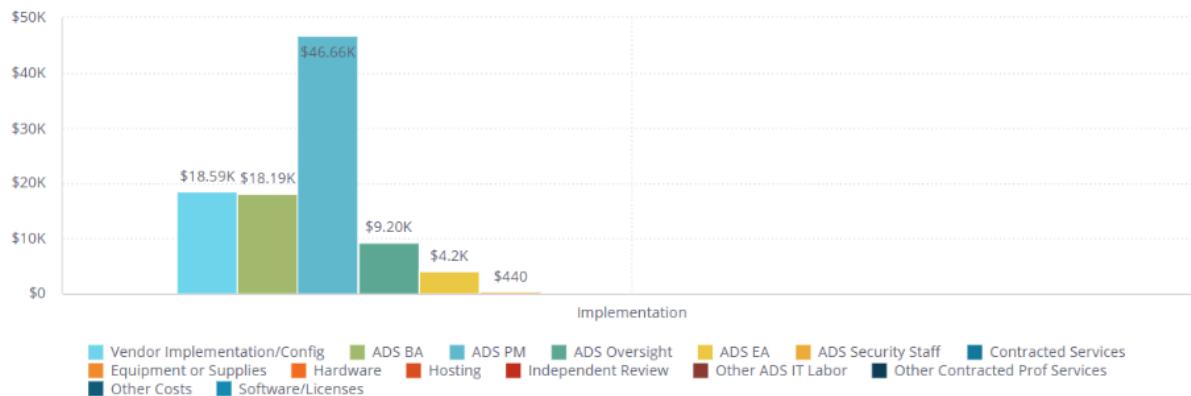
## Apptio Project Budget Details

Actual Project Costs through December 2025

### Budgeted vs Actual Invoiced Implementation Costs

| Cost Category* | Cost Type*                                       | Total Budget Cost | Total Invoiced Cost | Budget Remaining | % Budget Remai |
|----------------|--|-------------------|---------------------|------------------|----------------|
| Implementation | ADS EPMO Business Analyst for Implementation     | \$17,336.00       | \$8,448.00          | \$8,888.00       |                |
|                | ADS EPMO Project Manager for Implementation      | \$45,760.00       | \$55,792.00         | \$-10,032.00     |                |
|                | ADS EPMO Project Oversight & Reporting           | \$14,608.00       | \$3,740.00          | \$10,868.00      |                |
|                | Other ADS IT Labor for Implementation            | \$4,576.00        | \$14,388.00         | \$-9,812.00      |                |
|                | Vendor Implementation/Installation/Configuration | \$783,691.90      |                     | \$783,691.90     |                |
| Grand Total    |  | \$865,971.90      | \$82,368.00         | \$783,603.90     |                |

### Actual Implementation Costs by Cost Type



| IT ACTIVITY ANNUAL SUMMARY REPORT   |                                  |                                     |  |                                  |         |  |  |  |  |  |
|---|----------------------------------|-------------------------------------|--|----------------------------------|---------|--|--|--|--|--|
| Project Name  | ADS Shared Services VoIP         |                                     |  |                                  |         |  |  |  |  |  |
| Agency/Department   | Agency of Digital Services (ADS) |                                     | Current Project Phase  |                                  | Closing |  |  |  |  |  |
| Original Project Start Date   | 3/20/2020                        | Original Project Estimated End Date | 3/19/2025  | Number of Change Orders Approved | 3       |  |  |  |  |  |
| Actual Start Date   | 1/1/2020                         | Current Estimated End Date          | 3/19/2025  |                                  |         |  |  |  |  |  |
| Project   | Status                           |                                     | Update   |                                  |         |  |  |  |  |  |
| Scope   | ON TRACK                         |                                     | While implementation of VoIP phones has reached completion, project scope was impacted by the widely adopted use of MS Teams, resulting in fewer required VoIP phones. All project activities have been completed except for work related to E911 compliance.  |                                  |         |  |  |  |  |  |
| Schedule  | ON TRACK                         |                                     | While implementation of all project deliverables was expected to be completed by the fourth quarter for calendar year 2024, some change in scope and unexpected complexity in E911 implementation have caused delays. All project activities have been completed except for work related to E911 compliance. |                                  |         |  |  |  |  |  |
| Budget  | ON TRACK                         |                                     | Final cost of the project through January 2025 was approximately \$346,000 with 32% of the overall budget remaining.   |                                  |         |  |  |  |  |  |
| Overall   | ON TRACK                         |                                     |  |                                  |         |  |  |  |  |  |
| Scope Summary   |                                  |                                     |  |                                  |         |  |  |  |  |  |
| The State of Vermont is undertaking a strategic upgrade of its Enterprise Voice over Internet Protocol (VoIP) platform, which currently supports 6,500 users and is managed by the Agency of Digital Services (ADS) Shared Services Division. In partnership with NWN Carousel, the State aims to replace its existing VoIP platform to comply with the new E911 Rule and optimize the use of existing Internet Protocol (IP) Telephony hardware. |                                  |                                     |  |                                  |         |  |  |  |  |  |
| The primary objectives of this initiative include:  |                                  |                                     |  |                                  |         |  |  |  |  |  |
| <ul style="list-style-type: none"> <li>Cost Savings: The project aims to leverage cost efficiencies in the new VoIP system.</li> <li>Compliance: Ensuring the VoIP system adheres to the newly passed E911 Rule.</li> </ul>   |                                  |                                     |  |                                  |         |  |  |  |  |  |

- **Customer Service Improvement:** Enhancing the accuracy and efficiency of service operations, including moves, adds, changes, and deletes.
- **Improved Reporting Capabilities:** Providing greater flexibility in generating reports necessary for billing and other operational needs.
- **Enhanced Call Detail Access:** Offering detailed long-distance call information and enabling users to query call details through a self-service portal.
- **Billing Code Information Accuracy:** Ensuring precise billing code data to improve financial management.

This upgrade represents a significant step forward in enhancing the State's telecommunications infrastructure, focusing on compliance, cost savings, and improved service delivery. By implementing these changes, the State of Vermont is committed to providing efficient, reliable, and compliant communication services to its users.

#### Schedule Summary

With the exception of E911, which is estimated to be implemented early in calendar year 2025, project deliverables were completed on schedule.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$512,456                                    | \$512,456                                      | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$4,588,455                                  | \$4,588,455                                    | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$5,100,911                                  | \$5,100,911                                    | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

#### Schedule Variance and Budget to Actuals Charts

## ADS - Shared Services - VOIP Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

⋮

Over Schedule (Increase, in days)

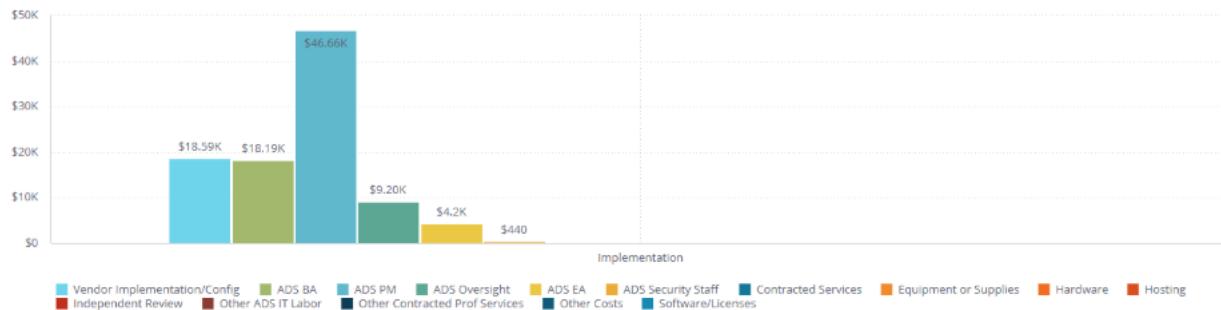
0

% Over Schedule

#N/A

⋮

Actual Implementation Costs by Cost Type





# Agency of Education (AOE)

| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |  |   |           |  |  |  |  |  |
|--|---|--|--|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | AOE - Education Quality - Educator Licensing System (ELS) |  |  |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Education (AOE)                                 |  | <b>Current Project Phase</b>   |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 8/9/2018  | <b>Original Project Estimated End Date</b> | 12/15/2025   | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 9/12/2023   | <b>Current Estimated End Date</b>          | 12/15/2025   |   |           |  |  |  |  |  |
| <b>Project</b>   | <b>Status</b>   |  | <b>Update</b>  |   |           |  |  |  |  |  |
| <b>Scope</b>   | <b>ON TRACK</b>   |  | The baseline scope includes the replacement of the existing licensing system with a Software as a Service solution that will be used by AOE, educators, and school districts in the State. All existing integrations are maintained. |   |           |  |  |  |  |  |
| <b>Schedule</b>  | <b>ON TRACK</b>   |  | We are in the closure phase of the project. The project was initiated on July 1, 2020, the vendor contract was executed on September 1, 2023, and go live was July 15, 2025.   |   |           |  |  |  |  |  |
| <b>Budget</b>  | <b>ON TRACK</b>   |  | Date change initiated by AOE resulted in an increase to the project of \$182,260, of which \$137,500 extended support for the legacy system by the vendor Aithent.   |   |           |  |  |  |  |  |
| <b>Overall</b>   | <b>ON TRACK</b>   |  |  |   |           |  |  |  |  |  |
| <b>Scope Summary</b>   |   |  |  |   |           |  |  |  |  |  |
| The State of Vermont is enhancing its educator licensing and management process by implementing a comprehensive solution. Initially considering OnBase and Salesforce, the State has decided to open the request for proposals (RFP) to include Commercial Off The Shelf (COTS) solutions, allowing for a broader selection of options. This new system will streamline the issuance and renewal of educator licenses, reducing administrative burdens and improving turnaround times. It will also track continuing education requirements, ensuring educators meet professional development obligations. Additionally, the solution will manage licensing enforcement cases, providing tools to document and address any violations, thus maintaining the integrity of the education system. The system will integrate fee collection, simplifying the payment process for educators. Overall, this initiative aims to improve efficiency, compliance, and management within Vermont's educator licensing framework, demonstrating the State's commitment to enhancing its education system. |   |  |  |   |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |   |  |  |   |           |  |  |  |  |  |
| The RFP allowing Commercial Off The Shelf (COTS) software responses was released in September 2022. A letter of intent was issued in February 2023. Independent Review was completed in August 2023. The contract was signed September 1, 2023. Implementation, originally scheduled for go live in December 2024, has been postponed at AOE's request. A new date, was set for then end of the school year was chosen. The new Vermont Licensing System for Educators (VLS) launched on July 15, 2025.  |   |  |  |   |           |  |  |  |  |  |
| <b>Budget Summary</b>  |   |  |  |   |           |  |  |  |  |  |

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,315,646.00                               | \$1,315,646.00                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,520,560.00                               | \$1,520,560.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$2,836,206.00                               | \$2,836,206.00                                 | ON TRACK                                       |
| <b>Solution Lifecycle Years</b>              | 5  |  |

### Schedule Variance and Budget to Actuals Charts

#### AOE Educator Licensing Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



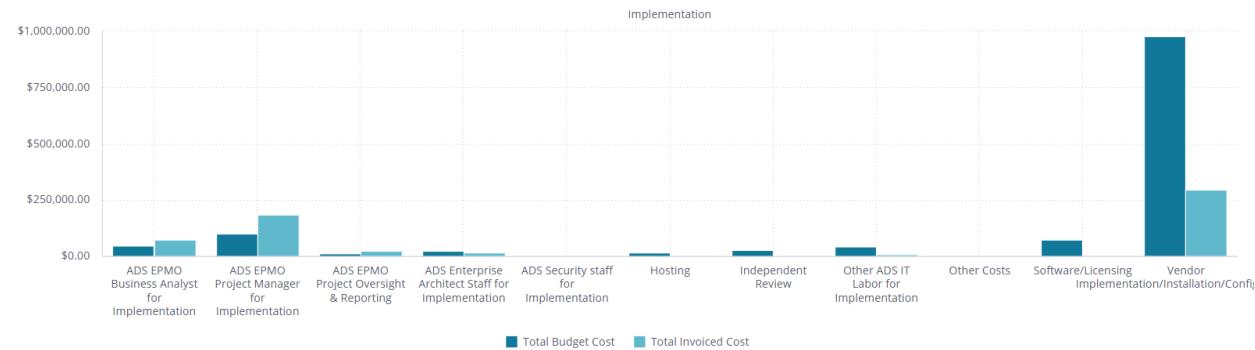
#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative               |
|--|-------------------------|--------------------|------------------|--------------------------------|
| Baseline 5 - Change Request                  | Baseline 5              | 9/1/20             | 7/15/25          | Go-live change request         |
| Revised IT-ABC                               | Baseline 3              | 9/1/20             | 10/31/22         | Reflects delayed start date    |
| Estimate at Contracting -- Randa             | Baseline 2              | 9/1/20             | 6/30/22          | COTS option                    |
| Initial Estimated Project Start-Finish Dates | Baseline at Contracting | 9/1/20             | 6/30/22          | Salesforce option              |
| Initial Salesforce Estimate                  | Initial Estimate        | 8/9/18             | 8/9/19           | One year installation estimate |

## Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |         |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|---------|
| Project Name                      | AOE - Child Nutrition Management System |                                     |  |                                  |         |
| Agency/Department                 | Agency of Education (AOE)               |                                     | Current Project Phase  |                                  | Closing |
| Original Project Start Date       | 12/18/2018                              | Original Project Estimated End Date | 5/30/2025  | Number of Change Orders Approved | 12      |
| Actual Start Date                 | 5/1/2020                                | Current Estimated End Date          | 5/30/2025  |                                  |         |
| Project                           | Status                                  |                                     | Update   |                                  |         |
| Scope                             | ON TRACK                                |                                     | <p>The baseline scope of this project includes all procurement sourcing and contracting events to include all associated change orders and amendments to the contract to date. The original project scope has been reduced significantly over the course of this project through multiple executed change orders and contract amendments.</p>  |                                  |         |
| Schedule                          | NEEDS LEADERSHIP INTERVENTION           |                                     | <p>This project was not completed during its originally anticipated timeline. This was the result of multiple extraordinary circumstances such as the Covid-19 pandemic and office/business closures, reprioritization of other emergency efforts during the pandemic, as well as resource shortages, on both the vendor and the State sides of this project.</p> <p>The project implementation schedule was ultimately delayed from December 31, 2021 to March 12, 2025.</p>  |                                  |         |
| Budget                            | MANAGEABLE RISKS                        |                                     | <p>The initial ITABC form for this project was executed on December 3, 2018. However, due to contracting and negotiation delays the initial contract was not executed until September 2, 2020, which required an updated ITABC form with re-baselined figures.</p> <p>That updated ITABC form was executed on 8/10/2020, updating the estimated cost for implementation to \$396,559.00.</p> <p>As the project progressed, additional resources and allocation challenges arose for project teams on both the state and vendor side,</p> |                                  |         |

|               |                               |   |
|---------------|-------------------------------|---|
|               |                               | <p>in addition to the necessary reprioritization resulting from the unforeseen covid 19- pandemic and the State's urgent response. These challenges play a significant role in schedule and timeline challenges, such as delays in requirements gathering from state resources, development on the vendor sides, and UAT amongst state resources.</p> <p>Additionally, during requirements gathering it became evident that additional scope for various customized features was required in order to meet the State's desired outcome for this system, and the implementation and addition of these customized features came at an additional cost that was originally anticipated through the baseline ITABC.</p> <p>Finally, it is important to note that as well as the inclusion of increased scope there were also instances in which scope was decreased over the life of the implementation with the vendor for this system, and as such costs for those requirements removed from scope were eliminated.</p> <p>Ultimately the implementation for this project came in higher than originally anticipated but that is based heavily on the project timeline extension of nearly 3 years to complete implementation.</p>  |
| Overall       | NEEDS LEADERSHIP INTERVENTION |   |
| Scope Summary |                               | <p>The Agency is committed to enhancing its Child Nutrition Management capabilities by replacing the existing system with a new and improved solution. The new system has already replaced the previous one and will offer expanded functionality once phase 2 is completed. The primary objective of this project is to provide a robust and efficient system that can accept and process program applications and claims for all School Nutrition Programs and Child and Adult Care Programs. The new system streamlines the application and claims processes, ensuring accuracy and efficiency in managing program enrollments and reimbursements. Additionally, the system is designed to manage data collections related to child nutrition programs. It provides a centralized platform for collecting and organizing data, ensuring compliance with USDA reporting requirements. This feature enables the Agency to accurately track program participation, meal counts, and other essential data points necessary for program evaluation and reporting. Furthermore, the new system offers comprehensive reporting capabilities. It generates reports that provide insights into program performance, financials, and compliance. These reports enable the Agency to monitor program effectiveness, identify areas for improvement, and ensure adherence to USDA regulations. Once phase 2 is</p> |

completed, the new system will offer expanded functionality. This expansion will further enhance the management of child nutrition programs, providing additional features and tools to support program administrators, school staff, and other stakeholders involved in the programs. In conclusion, the replacement of the Agency's Child Nutrition Management System marks a significant milestone in improving the management of School Nutrition Programs and Child and Adult Care Programs. The new system, already implemented and set to offer expanded functionality in phase 2, streamlines program applications and claims, manages data collections, and provides comprehensive reporting. This project's successful completion ensures compliance with USDA requirements and enhances the Agency's ability to provide nutritious meals to children and adults in need.

#### Schedule Summary

This project has successfully completed.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$396,559                                    | \$578,347.85                                   | OVER BUDGET                                    |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$665,000.00                                 | \$1,110,125.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$1,061,559.00                               | \$1,688,472.85                                 | OVER BUDGET                                    |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts

AOE CNP Schedule Variance Last refreshed Dec 22 8:41 am  

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



Schedule Estimates

| Estimate Name                                       | Estimate Stage          | Project Start Date | Project End Date | Change Narrative   |
|---|-------------------------|--------------------|------------------|--|
| 00. Initial Estimated Project Start-Finish Dates    | Initial Estimate        | 12/21/20           | 12/30/22         | Original ITABC Executed on 12/21/2020. And the Vendor Contract was executed on 12/20/2022. There were no estimated project dates on this version of the ITABC form.  |
| 01. Original Contracted Project Start-Finish Dates  | Baseline at Contracting | 9/21/20            | 12/31/21         | Vendor Contract was executed on 12/20/2022. Original contract term: 9/2/2020 - 6/30/2026. Implementation schedule: 9/20/2020-12/31/2021  |
| 05. Change Request #12 - Project-Start Finish Dates | Baseline 5              | 9/21/20            | 3/17/25          | Change Order #12, extended the implementation schedule to March 12, 2025 and was executed on 3/17/2025. There was no impact to life of the contract.   |
| 04. Change Request #11 - Project-Start Finish Dates | Baseline 4              | 9/21/20            | 2/28/25          | Change Order #11, extended the implementation schedule to February 28, 2028 and was executed on 2/11/2025. There was no impact to life of the contract.  |
| 03. Amendment #2 - Project-Start Finish Dates       | Baseline 3              | 9/21/20            | 12/31/24         | Amendment #2, extended implementation to the end of December 2024 and reduced scope of the project. 12/27/2023. There was no impact to life of the contract.   |
| 02. Amendment #1 - Project Start-Finish Dates       | Baseline 2              | 9/21/20            | 12/29/23         | Amendment #1, extended implementation to the end of December 2023. This was a result of change request #5, splitting implementation into two phases for partial system deployment. This amendment was executed on 2/23/2022. |

### AOE Child Nutrition Budget Details

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

| Cost Category* | Cost Type*  | Total Budget Cost | Total Invoiced Cost | Budget Remaining | % Budget Remaining |
|----------------|---|-------------------|---------------------|------------------|--------------------|
| Implementation | ADS Enterprise Architect Staff for Implementation         | \$31,768.00       | \$12,672.00         | \$19,096.00      | 60.11%             |
|                | ADS EPMD Business Analyst for Implementation              | \$128,196.00      | \$81,280.00         | \$77,916.00      | 60.32%             |
|                | ADS EPMD Project Manager for Implementation               | \$349,196.00      | \$254,472.00        | \$94,724.00      | 27.13%             |
|                | ADS EPMD Project Oversight & Reporting                    | \$22,072.00       | \$8,028.00          | \$16,044.00      | 72.89%             |
|                | ADS Security staff for Implementation                     | \$10,560.00       | \$1,100.00          | \$9,460.00       | 89.58%             |
|                | Independent Review  | \$76,000.00       | \$22,500.00         | \$53,500.00      | 68.47%             |
|                | Other ADS IT Labor for Implementation                     | \$64,000.00       | \$28,930.00         | \$35,062.00      | 54.80%             |
|                | Other Contracted Professional Services for Implementation | \$64,055.00       | \$14,654.50         | \$50,000.50      | 77.33%             |
|                | Other Costs   | \$75,054.50       | \$35,400.00         | \$39,654.50      | 52.83%             |
|                | Vendor Implementation/Installation/Configuration          | \$379,863.35      | \$48,591.30         | \$331,261.85     | 81.94%             |
| Grand Total    |   | \$1,201,374.85    | \$496,616.00        | \$704,758.85     | 58.66%             |

Actual Implementation Costs by Cost Type



## IT ACTIVITY ANNUAL SUMMARY REPORT

|                             |   |                                     |   |                                  |           |
|-----------------------------|---|-------------------------------------|---|----------------------------------|-----------|
| Project Name                | AOE - Student Pathways - Dual Enrollment Voucher System |                                     |   |                                  |           |
| Agency/Department           | Agency of Education (AOE)                               |                                     | Current Project Phase   |                                  | Execution |
| Original Project Start Date | 4/25/2022   | Original Project Estimated End Date | 12/15/2025  | Number of Change Orders Approved | 3         |
| Actual Start Date           | 7/18/2023   | Current Estimated End Date          | 12/15/2025  |                                  |           |
| Project                     | Status  |                                     | Update  |                                  |           |
| Scope                       | MANAGEABLE RISKS  |                                     | The baseline scope includes all procurement, sourcing and contracting events regarding software to support the State's Dual Enrollment Program Voucher System which provides a way for students, voucher coordinators, and college administration to manage high school students enrolled in college courses including the eligibility, voucher creation, available college courses, and reporting necessary for colleges to seek reimbursement from the dual enrollment program.   |                                  |           |
| Schedule                    | MANAGEABLE RISKS  |                                     | The two deployment releases, Dual Enrollment/Fast Forward and Early College are complete and available for use. Inclusion of this application in the myVermont identity management solution is underway. Flat file transfer for course catalogs and class information is being rolled out to each of the nine Vermont colleges. As of writing, one is complete. End dates for both are undetermined. just completed User Acceptance Testing and has been signed off by the AOE. It will be deployed by the vendor in an upcoming release cycle, users trained and the system ready for use in April. Code for APIs that will be used by the colleges will be released afterward. A contract change order reflecting the new date will be drafted. |                                  |           |
| Budget                      | ON TRACK  |                                     | The baseline budget for the implementation of this project with use of allocated ARPA funds is \$337,095.25.  |                                  |           |

| Overall   | MANAGEABLE RISKS                               |  |
|---|--|--|
| <b>Scope Summary</b>  |  |  |
| <p>The State of Vermont is enhancing its Dual Enrollment Program by developing new software to support the program's voucher system. This software will streamline the management of high school students taking college courses, benefiting students, voucher coordinators, and college administrators. Key features include eligibility verification to ensure only qualified students enroll, automated voucher creation for approved students, and access to a comprehensive list of available college courses. Additionally, the software will offer reporting tools for colleges to facilitate reimbursement processes. This initiative aims to improve efficiency, reduce manual work, and enhance the overall experience for all involved in the Dual Enrollment Program.</p> |  |  |
| <b>Schedule Summary</b>   |  |  |
| <p>The project was initiated on December 1, 2021. The solution is being delivered in two phases. Initial release of code for Dual Enrollment/Fast Forward was done 5/31/24. Early College (including invoicing) functionality was released on 9/26/25. Integration with the myVermont identity management application and implementation of improved data transfer from the colleges to the state are both active.</p>  |  |  |
| <b>Budget Summary</b>   |  |  |
| Total Original Estimated Implementation Cost  | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
| \$385,577.53  | \$385,577.53                                   | ON TRACK                                       |
| Total Original Estimated Operating Cost   | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$570,039.27  | \$570,039.27                                   | ON TRACK                                       |
| Total Original Estimated IT Activity Cost   | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$955,616.80  | \$955,616.80                                   | ON TRACK                                       |
| Solution Lifecycle Years  | 5  |  |

## Schedule Variance and Budget to Actuals Charts

### AOE Student Pathways - Dual Enrollment Vouchers Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



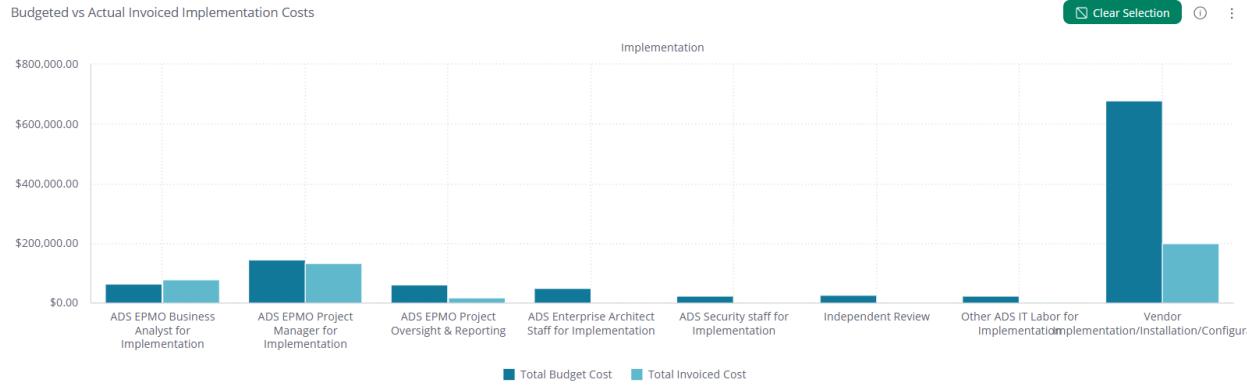
#### Schedule Estimates

| Estimate Name               | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                              |
|-----------------------------|-------------------------|--------------------|------------------|---|
| Baseline 2 (Change request) | Baseline 2              | 6/1/23             | 10/10/25         | Change request extending implementation       |
| Baseline at Contracting     | Baseline at Contracting | 6/1/23             | 4/1/24           | Update on IT ABC for revised schedule changes |
| Project inception           | Initial Estimate        | 9/1/21             | 6/30/22          | Estimate from initial IT-ABC                  |

### Annual Report Budget Summary

Actual Project Costs through November 2025

#### Budgeted vs Actual Invoiced Implementation Costs





# Agency of Human Services (AHS)

| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |  |   |                                  |         |  |  |  |  |  |
|---|---|--|---|----------------------------------|---------|--|--|--|--|--|
| Project Name  | AHS CO Refugee Resettlement Program Solution  |  |   |                                  |         |  |  |  |  |  |
| Agency/Department   | Agency of Human Services (AHS) Central Office |  | Current Project Phase   |                                  | Closing |  |  |  |  |  |
| Original Project Start Date   | 7/31/2023                                     | Original Project Estimated End Date          | 9/27/2025   | Number of Change Orders Approved | 3       |  |  |  |  |  |
| Actual Start Date   | 12/23/2024                                    | Current Estimated End Date                   | 9/27/2025   |                                  |         |  |  |  |  |  |
| Project   | Status  |  | Update  |                                  |         |  |  |  |  |  |
| Scope   | ON TRACK                                      |  | All contract scope has been delivered.  |                                  |         |  |  |  |  |  |
| Schedule  | ON TRACK                                      |  | This system is live. Closeout was held on October 7, 2025.                                      |                                  |         |  |  |  |  |  |
| Budget  | ON TRACK                                      |  | This initiative is 100% federally funded. The final cost was in line with the baselined budget. |                                  |         |  |  |  |  |  |
| Overall   | ON TRACK                                      |  |   |                                  |         |  |  |  |  |  |
| Scope Summary   |   |  |   |                                  |         |  |  |  |  |  |
| Procurement of an automated system that will more accurately capture information necessary to fulfill the needs of refugees in Vermont and complete federal reporting requirements. |   |  |   |                                  |         |  |  |  |  |  |
| Schedule Summary  |   |  |   |                                  |         |  |  |  |  |  |
| Project began in August 2023 and closed on October 7 2025.  |   |  |   |                                  |         |  |  |  |  |  |
| Budget Summary  |   |  |   |                                  |         |  |  |  |  |  |
| Total Original Estimated Implementation Cost  |   | Total Current Estimated Implementation Cost  | Budget Status – On Track, Over or Under Budget  |                                  |         |  |  |  |  |  |
| \$277,002.60  |   | \$459,135                                    | ON TRACK  |                                  |         |  |  |  |  |  |
| Total Original Estimated Operating Cost   |   | Total Current Estimated State Operating Cost | Budget Status – Over or Under Budget  |                                  |         |  |  |  |  |  |

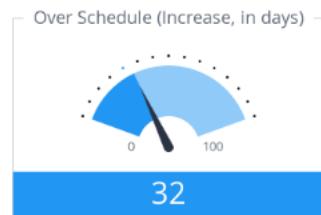
|   |  |                                      |
|---|--|--------------------------------------|
| \$553,782.65                              | \$468,121.15                                   | ON TRACK                             |
| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
| \$830,785.25                              | \$927,256.15                                   | ON TRACK                             |
| Solution Lifecycle Years                  | 5  |                                      |

### Schedule Variance and Budget to Actuals Charts

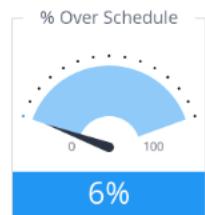
Source : Wrike Core (6128041).

#### Refugee Resettlement Case Management System Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



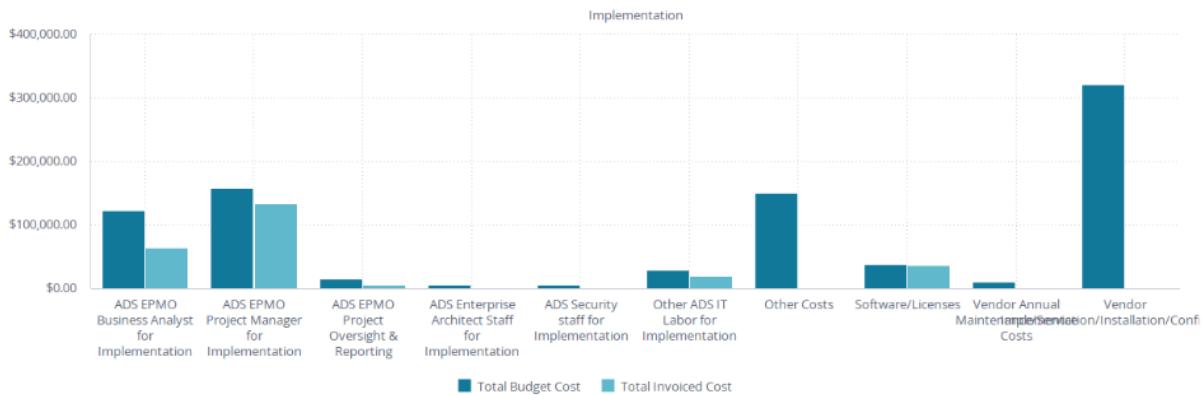
Schedule Estimates

## Refugee Resettlement Case Management Project

### Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |  |                                     |  |                                  |           |
|-----------------------------------|--|-------------------------------------|--|----------------------------------|-----------|
| Project Name                      | AHS DAIL Adult Services Division CRMS                                      |                                     |  |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) Department for Aging and Independent Living |                                     | Current Project Phase  |                                  | Execution |
| Original Project Start Date       | 3/1/2022   | Original Project Estimated End Date | 10/31/2026   | Number of Change Orders Approved | 3         |
| Actual Start Date                 | 8/8/2024   | Current Estimated End Date          | 10/31/2026   |                                  |           |
| Project                           | Status   |                                     | Update   |                                  |           |
| Scope                             | ON TRACK   |                                     | The project scope, initially defined by user stories, is being further refined through discovery sessions with the contractor's business analyst. This scope will be documented in the relevant project documents, and an Azure DevOps project site will be utilized to manage user stories, which serve as the requirements for the scope. This platform will facilitate the review, modification, validation, and acceptance of these requirements. Adjustments to the scope are currently under review due to findings from the discovery phase, including the unavailability of anticipated data collection interfaces and the need to explore alternative data sources. |                                  |           |
| Schedule                          | MANAGEABLE RISKS   |                                     | The project is currently in the discovery phase and is under close observation. During this phase, it became evident that the program's business needs are both complex and extensive. Although related business tasks took longer than expected, they have now been completed. The implementation project schedule is being carefully monitored, and so far, no changes to the start or go-live dates are necessary. The schedule will continue to be reviewed and updated as needed as the solution implementation progresses.   |                                  |           |
| Budget                            | ON TRACK   |                                     | The project budget is currently on track. Any change requests that involve cost adjustments will be reflected in the budget and, if necessary, through contract amendments. Efforts will be made to minimize changes that could impact the budget. The State Project Manager will oversee the budget using the ADS EPMO Project  |                                  |           |

|  |   |   |
|--|---|---|
|  |   | Management Tool, which will track both contractor and state expenses. This tool will be used throughout the solution's life cycle to update and maintain records of implementation and operational costs. It will also account for any cost changes related to approved change requests for contractor implementation and management services, as well as adjustments to state solution support and software costs. |
| Overall  | ON TRACK  |   |
| <b>Scope Summary</b>   |   |   |
| <p>The AHS DAIL Adult Services Division CRMS project is dedicated to enhancing the Adult Services Division through the development and implementation of a comprehensive Case Management System. The project scope has been defined by requirements (user stories) and will undergo further refinement during discovery sessions with a Contractor Business Analyst. The project aims to provide a robust and efficient system for managing cases within the Adult Services Division. As part of the project, a Legal dashboard will be provided to grant DAIL Legal Counsel access to the necessary information for authorized legal processes. This dashboard will serve as a centralized platform for accessing case-related information, supporting legal proceedings and ensuring compliance with legal requirements. Where viable the ASD CRM Solution will interface with other Department, Agency and State solutions for efficiency in business processes to best serve Vermonters.</p> |   |   |
| <b>Schedule Summary</b>  |   |   |
| <p>The Project is in the discovery phase and is currently on track. The Implementation Project Schedule was reviewed and adjusted by the Adult Services Project Team and Contractor representatives, no changes to Start or Go-Live dates during this review. The Schedule will be monitored and updated as needed as the solution implementation moves forward.</p>   |   |   |
| <b>Budget Summary</b>  |   |   |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b>   |
| 2365287.35   | 2365287.35  | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>   |
| 1404227.5  | 1404227.5   | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>   | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>   |
| 3769514.85   | 3769514.85  | ON TRACK  |
| <b>Solution Lifecycle Years</b>  | 5   |   |

## Schedule Variance and Budget to Actuals Charts

### AHS DAIL Adult Services Division CRMS Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

706

% Over Schedule

170%

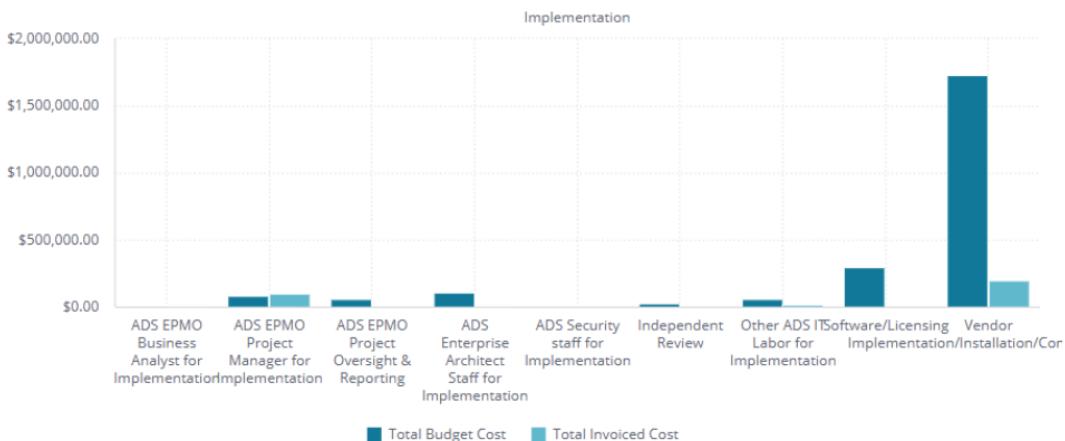
#### Schedule Estimates

| Estimate Name           | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                                |
|-------------------------|-------------------------|--------------------|------------------|---|
| Baseline at Contracting | Baseline at Contracting | 3/1/22             | 7/31/26          | Based on Contract Implementation work timeline. |

### AHS DAIL Adult Services Division CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |   |   |   |           |  |  |  |  |  |
|--|--|---|---|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | AHS DAIL DDSD Client Document Management Solution                          |   |   |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Human Services (AHS) Department for Aging and Independent Living |   | <b>Current Project Phase</b>  |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 6/17/2024  | <b>Original Project Estimated End Date</b>            | 10/21/2025  | <b>Number of Change Orders Approved</b> | 7         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 12/23/2024   | <b>Current Estimated End Date</b>                     | 10/21/2025  |   |           |  |  |  |  |  |
| <b>Project</b>   | <b>Status</b>  |   | <b>Update</b>   |   |           |  |  |  |  |  |
| <b>Scope</b>   | ON TRACK   |   | Scope was tightly managed to reflect a minimum viable product (MVP). Data migration was added to the project to improve the user experience. All scope was delivered. |   |           |  |  |  |  |  |
| <b>Schedule</b>  | MANAGEABLE RISKS   |   | This system is live as of August 22 2025.   |   |           |  |  |  |  |  |
| <b>Budget</b>  | ON TRACK   |   | The addition of data migration cost \$15,000. The multiple delays cost \$133,514 in State labor. Change requests for both have been approved.                         |   |           |  |  |  |  |  |
| <b>Overall</b>   | ON TRACK   |   |   |   |           |  |  |  |  |  |
| <b>Scope Summary</b>   |  |   |   |   |           |  |  |  |  |  |
| Agency of Human Services (AHS) Department of Disabilities Aging and Independent Living (DAIL) Disability has a priority to create a module to accommodate document sharing related to the State's HCBS conflict of interest compliance initiative. This module will allow Case Management Entities, Direct Services Providers (DA/SSAs) and the State to transmit information ( including check in/check out capacity). Ensuring audit trails for version control is paramount in this initiative. |  |   |   |   |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |  |   |   |   |           |  |  |  |  |  |
| Project was approved on May 28 2024 and was to be completed before March 31 2025. The project encountered multiple delays and went live on August 22 2025. Project closed on October 21 2025.  |  |   |   |   |           |  |  |  |  |  |
| <b>Budget Summary</b>  |  |   |   |   |           |  |  |  |  |  |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b>                         | <b>Budget Status – On Track, Over or Under Budget</b> |   |   |           |  |  |  |  |  |
| \$565,036.40   | \$713,550.40   | ON TRACK  |   |   |           |  |  |  |  |  |

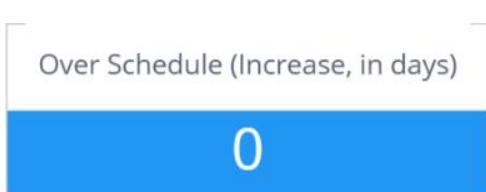
| Total Original Estimated Operating Cost   | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
| \$101,170                                 | \$101,170                                      | ON TRACK                             |
| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
| \$666,206.40                              | \$814,720.40                                   | ON TRACK                             |
| Solution Lifecycle Years                  | 5  |                                      |

#### Schedule Variance and Budget to Actuals Charts

### AHS DAIL Developmental Disabilities Services Project Schedule Variance

Initial Estimate to Current Baseline

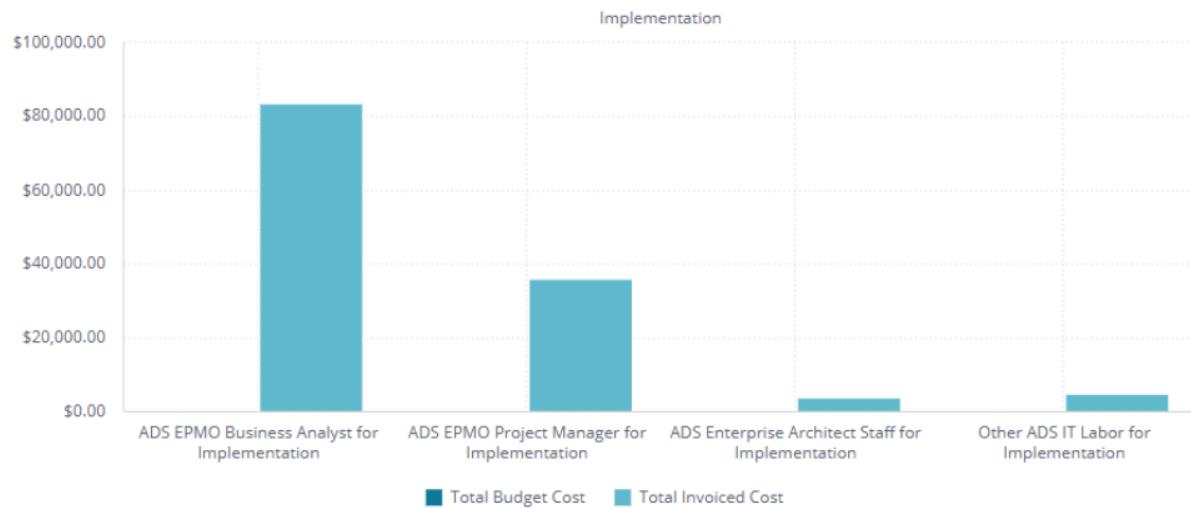
Initial Estimate to Current Baseline



## AHS DAIL Developmental Disabilities Services CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |  |  |   |           |
|------------------------------------|--|--|--|---|-----------|
| <b>Project Name</b>                | AHS DAIL DLP Adult Protective Services Investigation System                |  |  |   |           |
| <b>Agency/Department</b>           | Agency of Human Services (AHS) Department for Aging and Independent Living |  | <b>Current Project Phase</b>   |   | Execution |
| <b>Original Project Start Date</b> | 8/1/2019   | <b>Original Project Estimated End Date</b> | 10/31/2025   | <b>Number of Change Orders Approved</b> | 14        |
| <b>Actual Start Date</b>           | 8/8/2024   | <b>Current Estimated End Date</b>          | 10/31/2025   |   |           |
| <b>Project</b>                     | <b>Status</b>  |  | <b>Update</b>  |   |           |
| <b>Scope</b>                       | <b>ON TRACK</b>  |  | During the post-implementation phase, the project scope has remained consistent, focusing on completing post-implementation deliverables, addressing implementation bug fixes, and making implementation enhancements, all within the original project scope. Any additional work on the solution now involves enhancements, which are being implemented through change request statements of work.  |   |           |
| <b>Schedule</b>                    | <b>MANAGEABLE RISKS</b>  |  | The target go-live date for the new solution was successfully achieved with its launch on June 1, 2024. Post-implementation deliverables, including addressing bug fixes and making enhancements, have been evaluated and launched on various dates, with the final launch scheduled for on or before October 31, 2025. These items will have a six-month warranty based on their respective launch dates. The solution will then transition to the operational phase, with enhancements having their own schedules and assigned warranty periods. |   |           |
| <b>Budget</b>                      | <b>MANAGEABLE RISKS</b>  |  | The project successfully remained within the adjusted implementation budget. The ongoing enhancements are separate from the initial implementation and are funded through the contingency funding outlined in Contract Amendment 1.  |   |           |
| <b>Overall</b>                     | <b>ON TRACK</b>  |  |  |   |           |
| <b>Scope Summary</b>               |  |  |  |   |           |

The AHS DAIL DLP Adult Protective Services Investigation System project is dedicated to enhancing Adult Protective Services investigations through the development and implementation of a comprehensive system. The project began with the definition of initial requirements, and ongoing refinement takes place during the User Story discovery and approval processes. The project team is careful to maintain the original scope while incorporating necessary updates to meet the evolving needs of Adult Protective Services.

#### Schedule Summary

The Investigation solution was deployed to the production environment on May 30, 2024, and became live for users on June 1, 2024. Currently, post-implementation bug fixes and enhancements are being worked on and are scheduled to be deployed to production by October 31, 2025. These updates will be covered under a warranty period.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,459,456.75                               | \$1,284,686.75                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,418,850                                  | \$1,678,850                                    | OVER BUDGET                                    |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$2,878,306.75                               | \$2,963,536.75                                 | OVER BUDGET                                    |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts

### AHS DAIL DLP Adult Protective Services Investigation System Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



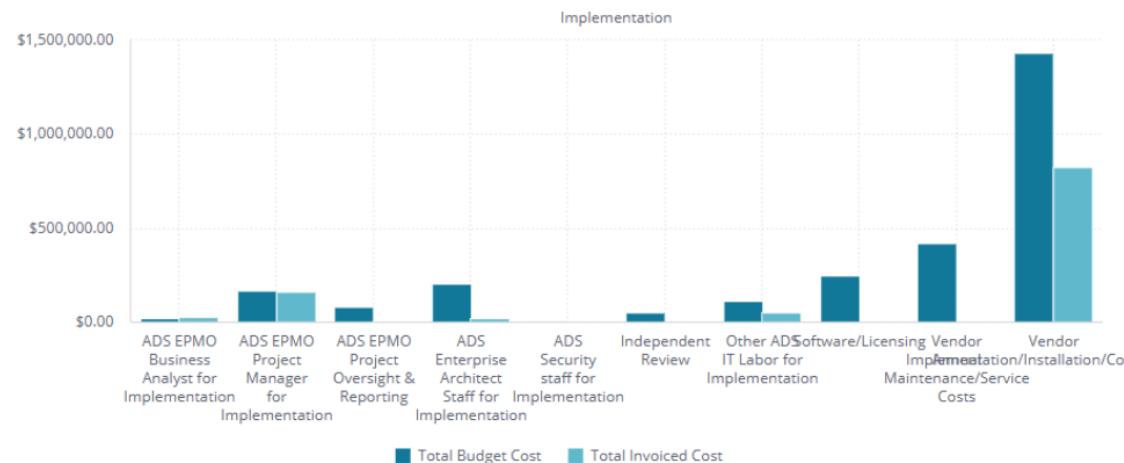
#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                                |
|--|-------------------------|--------------------|------------------|---|
| Baseline at Contracting                      | Baseline at Contracting | 1/23/23            | 12/31/25         | Based on Contract Implementation work timeline. |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 4/9/21             | 6/30/22          | Estimate at Initial IT ABC                      |

### AHS DAIL DLP Adult Protective Services Investigation System Annual Report Budget Summary

Actual Project Costs through September 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |   |   |                                  |          |  |  |  |  |  |
|--|--|---|---|----------------------------------|----------|--|--|--|--|--|
| Project Name   | AHS DAIL Office of Public Guardian CRMS                                    |   |   |                                  |          |  |  |  |  |  |
| Agency/Department  | Agency of Human Services (AHS) Department for Aging and Independent Living |   | Current Project Phase   |                                  | Planning |  |  |  |  |  |
| Original Project Start Date  | 4/5/2023   | Original Project Estimated End Date         | 7/31/2027   | Number of Change Orders Approved | 0        |  |  |  |  |  |
| Actual Start Date  |  | Current Estimated End Date                  | 7/31/2027   |                                  |          |  |  |  |  |  |
| Project  | Status   |   | Update  |                                  |          |  |  |  |  |  |
| Scope  | ON TRACK   |   | The scope remains unchanged. It has been defined by user story requirements and may be refined during the final stages of planning and procurement, with further adjustments possible during discovery sessions with the Contractor Business Analyst. |                                  |          |  |  |  |  |  |
| Schedule   | ON TRACK   |   | The project does not have a vetted implementation schedule as it is still in the planning and procurement phase. The business aims for a go-live date no later than July 2027.  |                                  |          |  |  |  |  |  |
| Budget   | ON TRACK   |   | The project's cost has not been finalized yet. Currently, only an estimated cost is available, derived from a cost analysis conducted during the project's initiation phase.  |                                  |          |  |  |  |  |  |
| Overall  | ON TRACK   |   |   |                                  |          |  |  |  |  |  |
| Scope Summary  |  |   |   |                                  |          |  |  |  |  |  |
| The Office of Public Guardian (OPG) project aims to improve services for Vermonters by developing and implementing a comprehensive case management system. This solution will manage program responsibilities, including referrals, requests, evaluations, diversions, assignments, case management, reporting, and the financial management of clients by fiscal guardians. The scope is outlined by user story requirements and will be further refined during discovery sessions with a Contractor Business Analyst. Where possible, the OPG CRM Solution will integrate with other departmental, agency, and state systems to enhance business process efficiency and better serve Vermonters. |  |   |   |                                  |          |  |  |  |  |  |
| Schedule Summary   |  |   |   |                                  |          |  |  |  |  |  |
| The project is currently in the planning and procurement phase and is progressing as scheduled. Once a vendor is selected, an implementation schedule will be established. This schedule will be regularly monitored and updated as necessary as the implementation of the solution advances.  |  |   |   |                                  |          |  |  |  |  |  |
| Budget Summary   |  |   |   |                                  |          |  |  |  |  |  |
| Total Original Estimated Implementation Cost   |  | Total Current Estimated Implementation Cost | Budget Status – On Track, Over or Under Budget  |                                  |          |  |  |  |  |  |

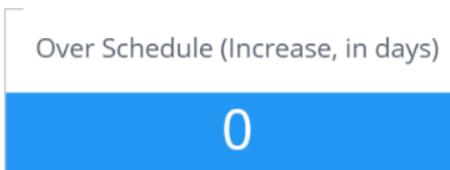
|  |   |   |
|--|---|---|
| \$1,597,988                                      | \$1,597,988   | ON TRACK                                    |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b> |
| \$2,065,262.75                                   | \$2,065,262.75  | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
| \$3,663,250.75                                   | \$3,663,250.75  | ON TRACK                                    |
| <b>Solution Lifecycle Years</b>                  | <b>5</b>  |   |

#### Schedule Variance and Budget to Actuals Charts

#### AHS DAIL Office of Public Guardian CRMS Project Schedule Variance

Initial Estimate to Current Baseline

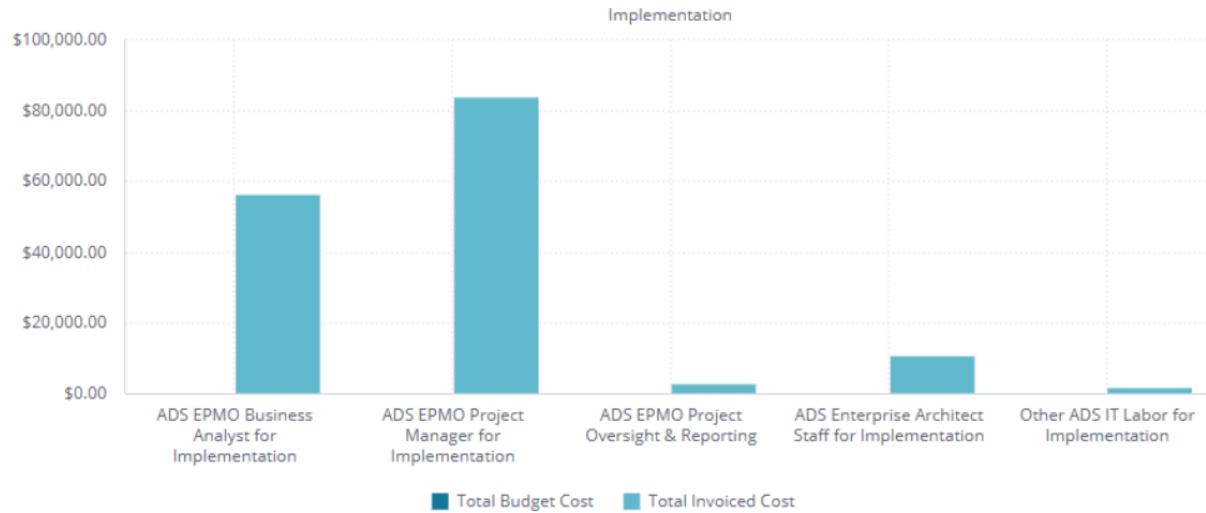
Initial Estimate to Current Baseline



## AHS DAIL Office of Public Guardian CRMS Annual Report Budget Summary

Actual Project Costs through September 2025

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |                               |   |         |  |  |
|--|---|--|-------------------------------|---|---------|--|--|
| <b>Project Name</b>  | AHS DCF CDD Integrated Information System                           |  |                               |   |         |  |  |
| <b>Agency/Department</b>   | Agency of Human Services (AHS) Department for Children and Families |  | <b>Current Project Phase</b>  |   | Closing |  |  |
| <b>Original Project Start Date</b>   | 7/1/2020  | <b>Original Project Estimated End Date</b> | 8/31/2025                     | <b>Number of Change Orders Approved</b> | 60      |  |  |
| <b>Actual Start Date</b>   | 4/19/2021   | <b>Current Estimated End Date</b>          | 8/31/2025                     |   |         |  |  |
| <b>Project</b>   | <b>Status</b>   |  | <b>Update</b>                 |   |         |  |  |
| <b>Scope</b>   | <b>MANAGEABLE RISKS</b>   |  | Project closed on 09/31/2025. |   |         |  |  |
| <b>Schedule</b>  | <b>ON TRACK</b>   |  | Project closed on 9/31/2025.  |   |         |  |  |
| <b>Budget</b>  | <b>MANAGEABLE RISKS</b>   |  | Project closed on 9/31/2025   |   |         |  |  |
| <b>Overall</b>   | <b>MANAGEABLE RISKS</b>   |  |                               |   |         |  |  |
| <b>Scope Summary</b>   |   |  |                               |   |         |  |  |
| <p>The State of Vermont recognizes the need for a robust and flexible Case Management solution within its Salesforce platform. To achieve this, the state plans to build a modular system that aligns with a common Human Service Data Model and integrates seamlessly through Mulesoft. This approach will enable efficient case management, promote extensibility, and consolidate technology resources. The modular Case Management solution will be designed to accommodate the unique requirements of various human service programs. By aligning with a common Human Service Data Model, the system will ensure consistency and interoperability across different programs. This will facilitate data sharing, streamline processes, and enhance collaboration among different stakeholders. Integration through Mulesoft will enable seamless communication and data exchange between the Case Management solution and other systems. This integration will ensure that relevant data is accessible and up-to-date, enabling real-time decision-making and efficient case management. Mulesoft's capabilities will enhance the overall functionality and connectivity of the system. To ensure extensibility and consolidation of technology, the Case Management solution will leverage common service applications. These applications will include Business Rules Management, Notice Generation, and Identity Authorization Management. By utilizing these common service applications, the system will be able to adapt to changing requirements, generate notices and communications efficiently, and manage identity authorization securely. The modular design of the Case Management solution will allow for flexibility and scalability. New modules can be added or modified as needed, ensuring that the system can adapt to evolving program requirements and accommodate future enhancements. This approach promotes long-term sustainability and reduces the need for extensive system overhauls. In conclusion, the development of a modular Case Management solution within the State's Salesforce platform represents a significant step forward in streamlining human service programs. By aligning with a common Human Service Data Model,</p> |   |  |                               |   |         |  |  |

integrating through Mulesoft, and leveraging common service applications, the state aims to enhance case management processes, improve data sharing, and ensure efficient collaboration among stakeholders. This project's successful implementation will enable the State of Vermont to effectively manage cases and provide quality services to its constituents.

#### Schedule Summary

The implementation of the project, initially slated for an 8-month timeframe to achieve a Minimum Viable Product (MVP), commenced with the contract engagement with Brite Systems in Spring of 2021. Ongoing complexities inherent in the solution's intricacies and the necessity to align with Legislative changes have led to an extension beyond the originally estimated timeline. Since its initiation in July 2020, modifications in staffing, scope adjustments, and technology upgrades have notably influenced the project's schedule. As of present, the anticipated completion date for the project stands at April 2025. The Schedule will be updated as we need to add more sprints based on the backlog prioritization.

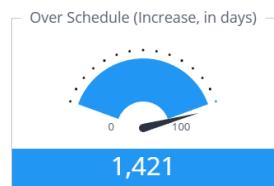
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$2,245,477                                  | \$5,459,294.82                                 | OVER BUDGET                                    |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$4,281,975                                  | \$4,156,975                                    | UNDER BUDGET                                   |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$6,527,452                                  | \$9,616,269.82                                 | OVER BUDGET                                    |
| Solution Lifecycle Years                     | 5  |  |

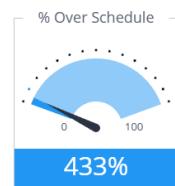
#### Schedule Variance and Budget to Actuals Charts

##### CDDIS Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



Schedule Estimates

## CDDIS Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |                                     |  |                                  |            |  |  |  |  |  |
|---|---|-------------------------------------|--|----------------------------------|------------|--|--|--|--|--|
| Project Name  | AHS DCF CDD IS Phase 2  |                                     |  |                                  |            |  |  |  |  |  |
| Agency/Department   | Agency of Human Services (AHS) Department for Children and Families |                                     | Current Project Phase  |                                  | Initiation |  |  |  |  |  |
| Original Project Start Date   | 9/26/2023   | Original Project Estimated End Date | 4/1/2027   | Number of Change Orders Approved | 0          |  |  |  |  |  |
| Actual Start Date   |   | Current Estimated End Date          | 4/1/2027   |                                  |            |  |  |  |  |  |
| Project   | Status  |                                     | Update   |                                  |            |  |  |  |  |  |
| Scope   | ON TRACK  |                                     | It has been agreed that feature parity with the Bright Futures Information System is the top priority in scope. The team has successfully validated and approved 545 user stories, which collectively define the full scope of this project.   |                                  |            |  |  |  |  |  |
| Schedule  | ON TRACK  |                                     | The project is currently in the bid evaluation phase, where the team is actively scoring submissions to identify finalists. Once the finalists are selected, the next steps will involve scheduling demonstrations to assess their capabilities in detail. Following these demonstrations, final selections will be made. With these ongoing activities, the estimated contract execution date is April 1, 2026. |                                  |            |  |  |  |  |  |
| Budget  | ON TRACK  |                                     | At this stage, the project remains within budget, with expenditures limited to invoices from internal team members, as the vendor selection process is still underway. Currently, bids are being evaluated, and it has been observed that most exceed the initial cost estimates. Consequently, additional funding will be necessary to support the successful completion of this project.                       |                                  |            |  |  |  |  |  |
| Overall   | ON TRACK  |                                     |  |                                  |            |  |  |  |  |  |
| Scope Summary   |   |                                     |  |                                  |            |  |  |  |  |  |
| The State of Vermont recognizes the need to modernize the Bright Futures Information System (BFIS) to overcome the limitations of the current outdated platform. The existing BFIS application has proven to be inadequate, prone to errors, and lacks the capability to accommodate new functionality. To address these challenges and improve the security posture of the AHS DCF, a project has been initiated to replace BFIS with a more robust and modern solution. |   |                                     |  |                                  |            |  |  |  |  |  |

The primary objective of this project is to enable both the Child Development Division (CDD) and the Agency of Digital Services (ADS) Maintenance & Operations (M&O) teams to focus on maintaining a single solution. By replacing BFIS, the project aims to streamline operations and reduce the burden of maintaining multiple systems. This consolidation will enhance efficiency and allow for better allocation of resources. Furthermore, the replacement of BFIS will significantly improve the security posture of AHS DCF. The outdated platform of BFIS poses security risks, and the new solution will address these vulnerabilities. By implementing a modern and secure system, the project will enhance data protection and ensure compliance with industry standards and regulations. The scope of phase 2 of this project involves building upon the Phase 1 Salesforce application in Org 2. This Salesforce application aligns with a common Human Service Data Model, providing a standardized framework for data management. The integration of the Salesforce application through Mulesoft enables seamless data exchange and interoperability with other systems, enhancing overall data management and accessibility.

In conclusion, the modernization of the Bright Futures Information System represents a significant step forward in improving functionality and security for the AHS DCF. By replacing the outdated BFIS with a more robust and modern solution, the project aims to streamline operations, enhance data security, and improve the overall efficiency of the agency. The completion of phase 2 will build upon the Salesforce application and align it with a common Human Service Data Model, ensuring standardized data management and integration capabilities.

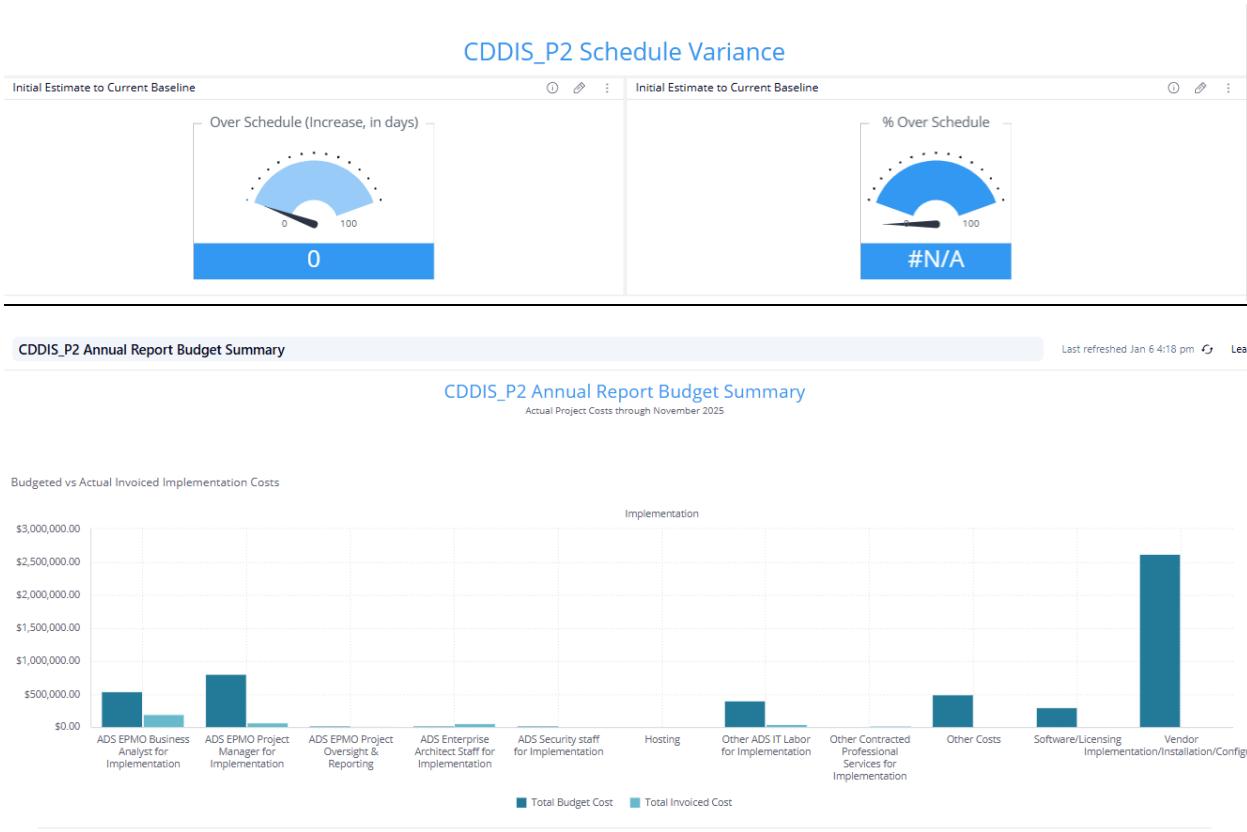
#### Schedule Summary

The project commenced on September 26, 2023, with an estimated contract execution date of April 1, 2026. As the team progresses towards contract execution, the implementation timeline will be defined, with an anticipated duration of 12 to 18 months.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$5,243,472.03                               | \$5,243,472.03                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$3,324,825                                  | \$3,324,825                                    | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$8,568,297.03                               | \$8,568,297.03                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |  |   |          |  |  |  |  |  |
|--|---|--|--|---|----------|--|--|--|--|--|
| <b>Project Name</b>  | AHS DCF CCWIS   |  |  |   |          |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Human Services (AHS) Department for Children and Families |  | <b>Current Project Phase</b>   |   | Planning |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 1/2/2023  | <b>Original Project Estimated End Date</b> | 3/31/2028  | <b>Number of Change Orders Approved</b> | 0        |  |  |  |  |  |
| <b>Actual Start Date</b>   | 1/2/2023  | <b>Current Estimated End Date</b>          | 3/31/2028  |   |          |  |  |  |  |  |
| Project  | <b>Status</b>   |  | <b>Update</b>  |   |          |  |  |  |  |  |
| <b>Scope</b>   | ON TRACK  |  | Our project scope remains on track, aligning with the defined objectives and requirements.                                   |   |          |  |  |  |  |  |
| <b>Schedule</b>  | MANAGEABLE RISKS  |  | Our project schedule has extended to allow for a more thorough proposal review for implementation vendor selection.          |   |          |  |  |  |  |  |
| <b>Budget</b>  | MANAGEABLE RISKS  |  | Most implementation vendor costs exceed the current approved budget.   |   |          |  |  |  |  |  |
| <b>Overall</b>   | MANAGEABLE RISKS  |  | The project team is managing schedule and budget risks as the final implementation vendor is selected with their leadership. |   |          |  |  |  |  |  |
| <b>Scope Summary</b>   |   |  |  |   |          |  |  |  |  |  |
| <p>The State of Vermont is committed to enhancing child welfare services through the implementation of the CCWIS Solution Project. This project aims to develop and implement a comprehensive child welfare information system that will improve data management and decision-making processes. The CCWIS Solution Project encompasses various stages, including design, development, and integration of the CCWIS. The system will be designed to meet the specific needs and requirements of child welfare services in Vermont. It will enable efficient data collection, storage, and analysis, providing a comprehensive view of child welfare cases. Data migration is a critical component of the project, ensuring a seamless transition from the existing system to the new CCWIS. The migration process will involve transferring data from the old system to the new system, ensuring data integrity and accuracy. Staff training will also be provided to ensure that users are proficient in utilizing the new system effectively. The key objectives of the CCWIS Solution Project are to ensure compliance with federal guidelines, enhance data sharing, and increase efficiency in case management. The system will be designed to meet federal requirements and guidelines, ensuring that child welfare services in Vermont are in alignment with national standards. The CCWIS will also facilitate improved data sharing among relevant stakeholders, enabling better collaboration and coordination in child welfare cases. Additionally, the system will enhance efficiency in case management, streamlining processes and reducing administrative burdens. It is important to note that the project scope is focused solely on the development and implementation of the CCWIS. Unrelated IT developments and hardware overhauls are excluded from the scope to maintain project focus and efficiency. The deliverables of the project include a fully functional CCWIS, comprehensive documentation, and a support plan. The system will be thoroughly tested and validated to ensure its functionality and reliability. Documentation will provide guidance on system usage, maintenance, and troubleshooting. A support plan will be established to address</p> |   |  |  |   |          |  |  |  |  |  |

any issues or concerns that may arise during system operation. The CCWIS Solution Project is subject to budget limitations and strict adherence to data privacy laws. The project will be managed within the allocated budget, ensuring efficient resource utilization. Data privacy laws and regulations will be strictly followed to protect sensitive information and maintain confidentiality.

#### Schedule Summary

This CCWIS Solution Project is currently in exploration phase, actively reviewing bids from potential vendors. An implementation vendor will be selected early 2026.

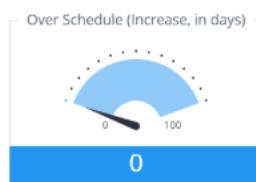
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$8,568,297.03                               | \$8,568,297.03                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$2,643,120                                  | \$2,643,120                                    | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$12,139,828                                 | \$12,139,828                                   | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

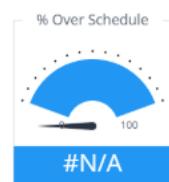
#### Schedule Variance and Budget to Actuals Charts

##### AHS DCF Child Welfare Information System Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



## Annual Report Budget Summary

Actual Project Costs through November 2025

### Budgeted vs Actual Invoiced Implementation Costs

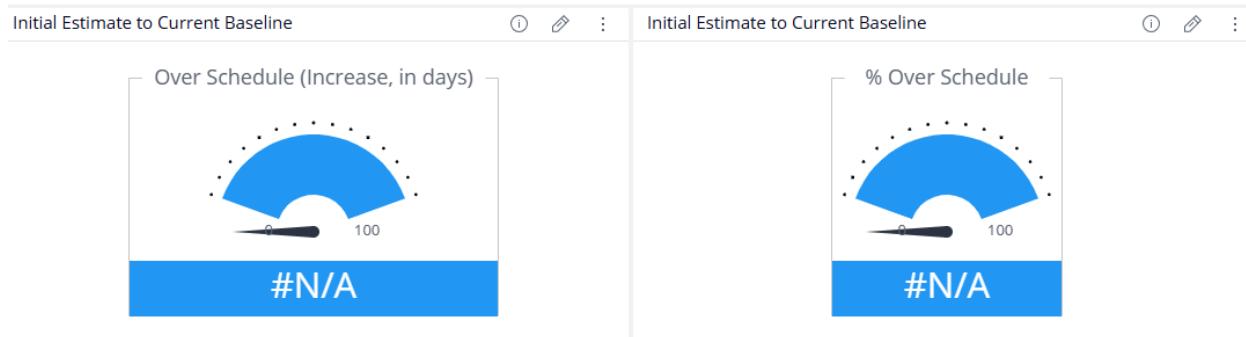


| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |   |   |   |           |  |  |  |  |  |
|--|--|---|---|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | AHS DMH CANS/ANSA  |   |   |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Agency of Human Services (AHS) Department of Mental Health |   | <b>Current Project Phase</b>  |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 9/3/2024   | <b>Original Project Estimated End Date</b>            | 7/31/2025   | <b>Number of Change Orders Approved</b> | 1         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 9/20/2024  | <b>Current Estimated End Date</b>                     | 3/31/2026   |   |           |  |  |  |  |  |
| <b>Project</b>   | <b>Status</b>  |   | <b>Update</b>   |   |           |  |  |  |  |  |
| <b>Scope</b>   | <b>MANAGEABLE RISKS</b>                                    |   | The scope is defined as part of the Request for Proposal (RFP) and executed contract. |   |           |  |  |  |  |  |
| <b>Schedule</b>  | <b>MANAGEABLE RISKS</b>                                    |   | The project is scheduled to complete in March of 2026                                 |   |           |  |  |  |  |  |
| <b>Budget</b>  | <b>ON TRACK</b>  |   | Spending continues to be within project expected budget.                              |   |           |  |  |  |  |  |
| <b>Overall</b>   | <b>MANAGEABLE RISKS</b>                                    |   | Overall manageable risk as project is still set to complete with March of 2026        |   |           |  |  |  |  |  |
| <b>Scope Summary</b>   |  |   |   |   |           |  |  |  |  |  |
| The main objectives of the project are to deliver Transformational Collaborative Outcomes Management (TCOM) Implementation technical assistance and consultation, a Dashboard, and a Decision Support Model (DSM) for certain populations. |  |   |   |   |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |  |   |   |   |           |  |  |  |  |  |
| Implementation started in September 2024 and is expected to complete March 2026. However, there have been some delays therein on when we expected deliverables from implementation vendor and adjustments to the details of the schedule.  |  |   |   |   |           |  |  |  |  |  |
| <b>Budget Summary</b>  |  |   |   |   |           |  |  |  |  |  |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b>         | <b>Budget Status – On Track, Over or Under Budget</b> |   |   |           |  |  |  |  |  |
| \$507,695  | \$507,695  | <b>ON TRACK</b>                                       |   |   |           |  |  |  |  |  |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>        | <b>Budget Status – Over or Under Budget</b>           |   |   |           |  |  |  |  |  |
| \$15,000   | \$15,000   | <b>ON TRACK</b>                                       |   |   |           |  |  |  |  |  |

| Total Original Estimated IT Activity Cost |  | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
|---|--|--|--------------------------------------|
| \$522,695                                 |  | \$522,695                                      | ON TRACK                             |
| Solution Lifecycle Years                  |  | 5  |                                      |

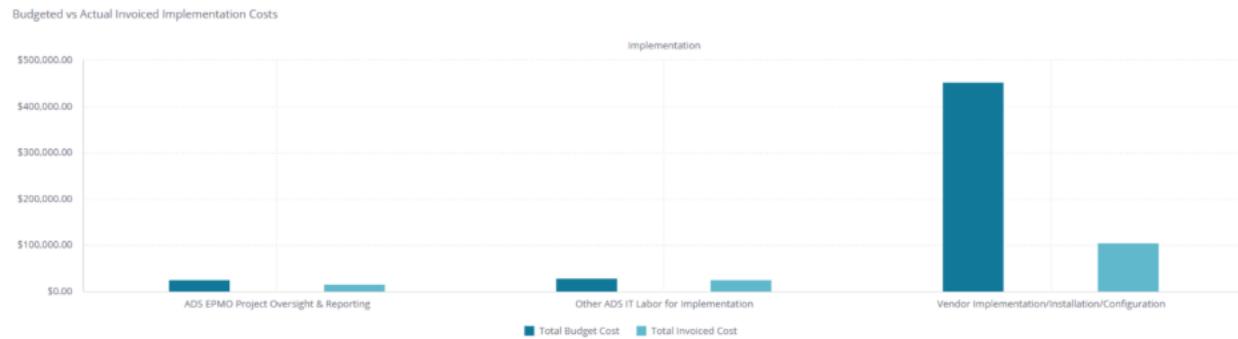
### Schedule Variance and Budget to Actuals Charts

#### AHS DMH CANS/ANSA Upgrade Schedule Variance



#### CANS ANSA Annual Report Budget Summary

Actual Project Costs through November 2025



| IT ACTIVITY ANNUAL SUMMARY REPORT   |  |                                     |  |                                  |   |  |  |  |  |  |
|---|--|-------------------------------------|--|----------------------------------|---|--|--|--|--|--|
| Project Name  | AHS DVHA MMIS Special Investigations Unit (SIU) Case Management System (CMS) |                                     |  |                                  |   |  |  |  |  |  |
| Agency/Department   | Agency of Human Services (AHS) Department of Vermont Health Access           |                                     | Current Project Phase  | Initiation                       |   |  |  |  |  |  |
| Original Project Start Date   | 6/21/2023  | Original Project Estimated End Date | 11/28/2025   | Number of Change Orders Approved | 0 |  |  |  |  |  |
| Actual Start Date   | 6/3/2025   | Current Estimated End Date          | 1/28/2028  |                                  |   |  |  |  |  |  |
| Project   | Status   |                                     | Update   |                                  |   |  |  |  |  |  |
| Scope   | ON TRACK   |                                     | <ul style="list-style-type: none"> <li>-Replace current Microsoft Access Databases by implementing a new case management system for the Special Investigations Unit (SIU) and Coordination of Benefits (COB)</li> <li>-Successful decommissioning of the Surveillance and Utilization Review Subsystem (SURS) and Provider Suspension Microsoft Access Databases, the Third-Party Liability (TPL) System and the shared drive files are migrated to the new solution, and the new system meets security</li> <li>-The proposed application/solution must have capabilities that would aide Special Investigations Unit (SIU) and Coordination of Benefits (COB) in creating reporting metrics that would allow DHVA to measure compliance with CFR and VSA.</li> </ul> |                                  |   |  |  |  |  |  |
| Schedule  | ON TRACK   |                                     | <p>The project is currently in the planning phase, with teams concentrating on finalizing the IT ABC Analysis form and the RFP, which is expected to be completed by October 31, 2025. The plan is to submit these documents to CMS for approval in November 2025, prior to soliciting bids from vendors.</p>  |                                  |   |  |  |  |  |  |
| Budget  | ON TRACK   |                                     | <p>Total estimated budget for implementation is \$904,240.00. Since the project awaits IT ABC finalization and approval, actuals as of date has not been recorded.</p>   |                                  |   |  |  |  |  |  |
| Overall   | ON TRACK   |                                     |  |                                  |   |  |  |  |  |  |
| Scope Summary   |  |                                     |  |                                  |   |  |  |  |  |  |
| <p>DVHA seeks to procure a new case management system for the Special Investigations Unit (SIU) and Coordination of Benefits (COB) units to replace their current Microsoft Access systems. These current systems utilize technology that is no longer supported, unstable, unreliable and undersized. The new case management system will support file storage, auditability, accuracy and can update and manipulate data therefore minimizing the risks</p> |  |                                     |  |                                  |   |  |  |  |  |  |

of losing data. Both Units experience similar problems with their current systems, requiring growth, the need to secure appropriate case workflows & the necessary file permissions which today are open for any staff to modify. For TPL, the COB team needs accurate account records, ability to share information, awareness of staff updates & audit capabilities, all of which are missing today.

#### Schedule Summary

The project is currently pending approval for the IT ABC and the finalization of the RFP, which is anticipated to be submitted to CMS by October 31, 2026. The projected Go Live and completion date is being targeted for September 2026.

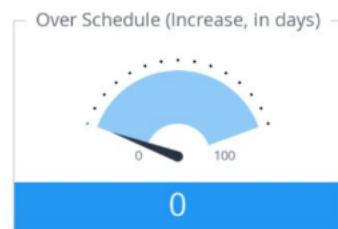
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$987,069.80                                 | \$987,069.80                                   | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
|  | 0  | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
|  | \$987,069.80                                   | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

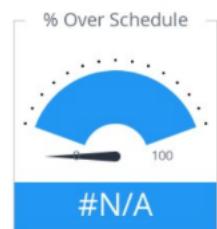
#### Schedule Variance and Budget to Actuals Charts

##### SIU COB Schedule Variance

Initial Estimate to Current Baseline



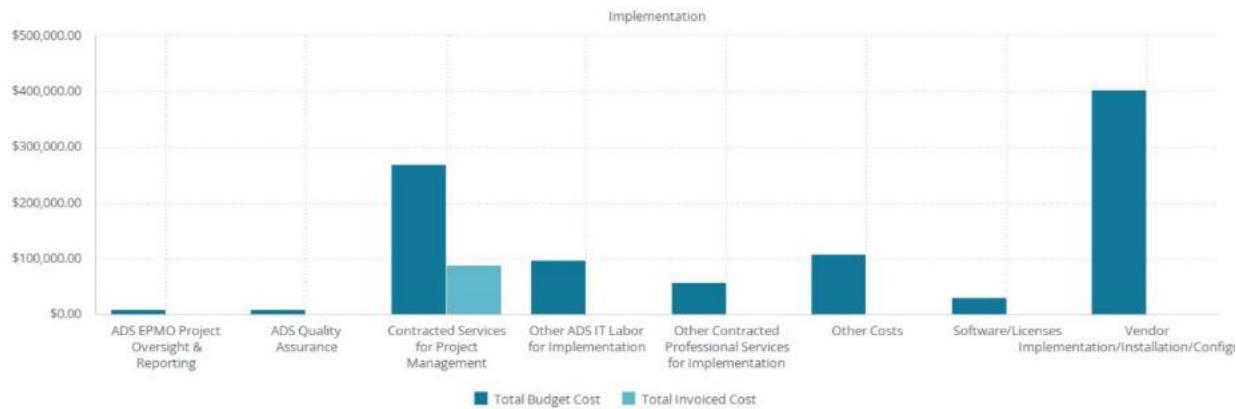
Initial Estimate to Current Baseline



## SIU COB Annual Report Budget Summary

Actual Project Costs through November 2025

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |   |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|---|
| Project Name                      | AHS DVHA Integrated Eligibility and Enrollment System (VT-IES)      |                                     |  |                                  |   |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase  | Planning                         |   |
| Original Project Start Date       | 7/20/2023   | Original Project Estimated End Date | 6/30/2028  | Number of Change Orders Approved | 0 |
| Actual Start Date                 | 7/20/2023   | Current Estimated End Date          | 6/30/2028  |                                  |   |
| Project                           | Status  |                                     | Update   |                                  |   |
| Scope                             | ON TRACK  |                                     | The Vermont Integrated Eligibility and Enrollment (VT-IES) Project aims to modernize the state's eligibility system through a phased, modular approach, enhancing user experience for both residents and staff. This new system will introduce a Customer Portal, Case Management, and Rules Engine to streamline access, improve accuracy, and ensure efficient eligibility determinations. By replacing outdated systems, the project seeks to provide a customer-centered, reliable, and efficient service platform for Vermonters. |                                  |   |
| Schedule                          | NEEDS LEADERSHIP INTERVENTION                                       |                                     | The project is in the Planning phase and is actively engaged in procurement. Actual dates for future milestones are dependent upon the outcome of the procurement and the final, executed contract with the selected vendor. At this time, the Planning phase is anticipated to be completed by Q2 2026. The project Execution phase is anticipated from Q3 2026 to Q3 2029, with a phased implementation over an estimated three years for the chosen solution. The project Closing phase is anticipated in Q4 2029.                  |                                  |   |
| Budget                            | ON TRACK  |                                     | The approved budget for implementation is \$112,099,813.80. As of October 2025, the implementation spend captured by EPMO invoice tracking is \$3,392,224.49, representing approximately 3.03% of the total budget.  |                                  |   |
| Overall                           | ON TRACK  |                                     |  |                                  |   |
| Scope Summary                     |   |                                     |  |                                  |   |

The Vermont Integrated Eligibility System (VT-IES) Project is a crucial part of the state's effort to modernize its IE&E system. The current system faces operational and technical challenges impacting Vermonters and state staff. The VT-IES Project aims to address these issues by implementing a customer-focused IES through a phased, modular procurement strategy. The new IES will consist of a Customer Portal, Case Management, and Rules Engine modules, replacing legacy enrollment systems and optimizing eligibility, enrollment, and customer management functionality.

The new IES will provide Vermonters with a centralized, simplified, and user-friendly experience for applying and managing benefits. It will ensure secure enrollment, personalized access, streamlined applications, and comprehensive customer service. State staff will benefit from reduced manual work, improved data integrity, and automated processes.

#### Schedule Summary

The VT-IES project continues to move ahead with the procurement effort for a modern IE&E solution. Beginning in Q1 2025 and continuing throughout this year, the State is evaluating proposals received from the solution vendor community. Looking ahead, the project anticipates execution of a contract with the selected vendor by the end of Q2 2026. The project Execution phase is anticipated from Q3 2026 to Q3 2029, with a phased implementation approach for the chosen solution. The project Closing phase is anticipated in Q4 2029.

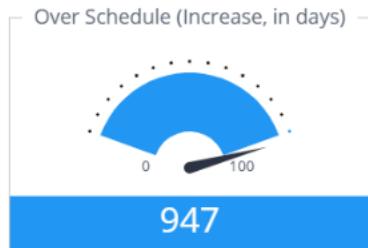
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$112,099,813.80                             | \$112,099,813.80                               | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$119,592,991                                | \$119,592,991                                  | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$231,692,804.80                             | \$231,692,804.80                               | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

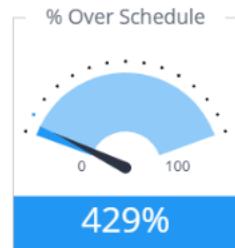
Schedule Variance and Budget to Actuals Charts

## IEENTC Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



Schedule Estimates

| Estimate Name                              | Estimate Stage          | Change Date | Project Start Date | Project End Date | Change Narrative          |
|--|-------------------------|-------------|--------------------|------------------|---------------------------|
| Baseline at Contracting Start-Finish Dates | Baseline at Contracting | 11/24/25    | 5/27/22            | 1/1/27           | Baseline scheduled develo |

## IEENTC Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |          |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|----------|
| Project Name                      | AHS DVHA MMIS DOC Justice Reentry                                   |                                     |  |                                  |          |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase  |                                  | Planning |
| Original Project Start Date       | 11/18/2024  | Original Project Estimated End Date | 1/1/2026   | Number of Change Orders Approved | 0        |
| Actual Start Date                 |   | Current Estimated End Date          | 1/1/2026   |                                  |          |
| Project                           | Status  |                                     | Update   |                                  |          |
| Scope                             | ON TRACK  |                                     | Despite adjustments to the implementation timeline and approach, the scope of the project remains fully aligned with the original project charter, ensuring that all planned objectives and outcomes continue to guide the work.   |                                  |          |
| Schedule                          | MANAGEABLE RISKS  |                                     | <p>Over the past year, the original plan to complete full implementation of all project functionality by the end of calendar year 2025 was reassessed. The complexity of coordinating across four systems and five vendors, combined with limited resource availability due to competing AHS-wide priorities, led to delays in development progress. In response, the implementation approach was adjusted to break the work into focused workstreams, allowing for clearer prioritization and more agile decision-making. This revised structure has helped reestablish momentum and improve coordination among stakeholders.</p> <p>The current targets are:</p> <ul style="list-style-type: none"> <li>Ability to suspend by 12/31/2025.</li> <li>Ability to process bills, claims, and payments by June 2026.</li> <li>Enhancements reducing manual processing and data sharing by December 2026.</li> </ul> |                                  |          |
| Budget                            | MANAGEABLE RISKS  |                                     | Total project implementation budget is \$1,569,349. At the start of Q4 of 2025, 6.5% has been spent totaling \$101,582.  |                                  |          |
| Overall                           | ON TRACK  |                                     |  |                                  |          |
| Scope Summary                     |   |                                     |  |                                  |          |

This project aims to improve Medicaid coordination for justice-involved individuals by integrating and sharing critical data between the Department of Corrections (DOC), Vermont Health Connect (VHC), ACCESS, the Medicaid Management Information System (MMIS), and the Pharmacy Benefits Manager (PBM). It includes enhancements to the DOC's Electronic Health Record (EHR) system to capture key demographic and custody information, automated processes for suspending and restoring Medicaid benefits based on incarceration status, and coverage of a pre-release service package starting 90 days before release. The initiative also establishes member notifications at critical points and provides training for DOC and Wellpath staff to support the effective use of new systems and procedures, ultimately promoting continuity of care and successful reentry into the community.

#### Schedule Summary

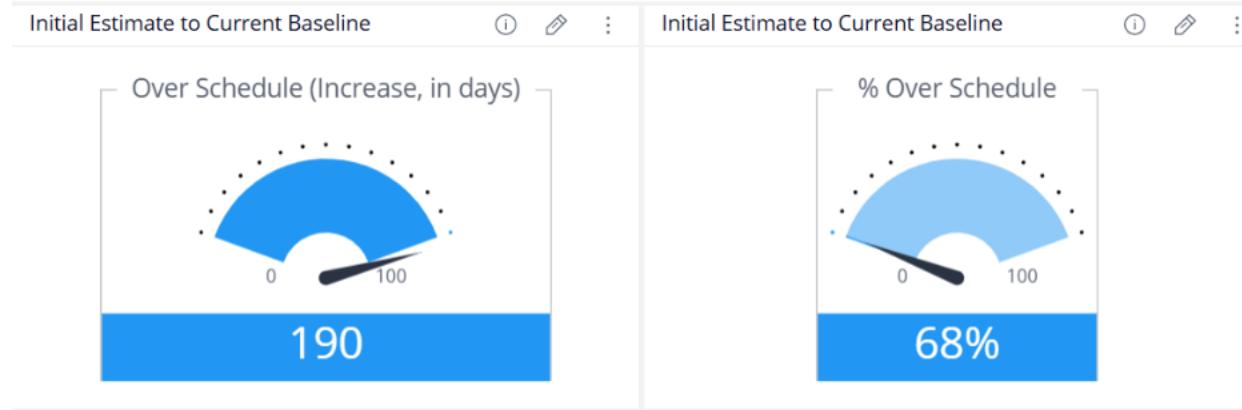
To meet federal oversight requirements, the State must implement the ability to suspend Medicaid coverage for individuals entering incarceration no later than December 31, 2025. In alignment with federal commitments, functionality to support Medicaid claims processing, billing, and payments must be in place by June 2026. Following the successful implementation and stabilization of these core components, additional system enhancements will be pursued to further reduce manual processing and improve data sharing across five integrated platforms. These subsequent improvements will be prioritized and completed as soon as operationally practical.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,569,349                                  | \$1,569,349                                    | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
|  | 0  | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
|  | \$1,569,349                                    | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts

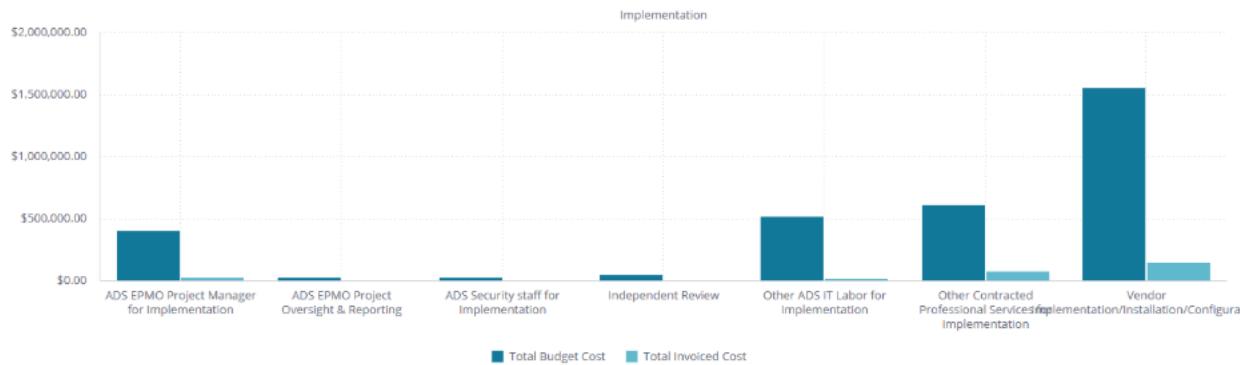
### AHS DVHA MMIS DOC Justice Reentry Schedule Variance



### Annual Report Budget Summary

AHS DVHA MMIS DOC Justice Reentry  
Actual Project Costs through November 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |  |  |   |            |
|------------------------------------|---|--|--|---|------------|
| <b>Project Name</b>                | AHS DVHA MMIS Interoperability Enhancements Phase II                |  |  |   |            |
| <b>Agency/Department</b>           | Agency of Human Services (AHS) Department for Vermont Health Access |  | <b>Current Project Phase</b>   |   | Initiation |
| <b>Project Sponsor</b>             |   |  |  |   |            |
| <b>Original Project Start Date</b> | 9/10/2024   | <b>Original Project Estimated End Date</b> | 3/31/2027  | <b>Number of Change Orders Approved</b> | 0          |
| <b>Actual Start Date</b>           |   | <b>Current Estimated End Date</b>          | 3/31/2027  |   |            |
| <b>Project</b>                     | <b>Status</b>   |  | <b>Update</b>  |   |            |
| <b>Scope</b>                       | <b>ON TRACK</b>   |  | Configuration of the Gainwell solutions to meet the CMS-0057-Final ruling addressing Improving Prior Authorization Processes for the 14 Medicaid Prior Authorization business units. Development of interim error reporting process to address the Analytics Data Warehouse reported errors. Complete data sharing across business units and service providers/receivers. Development of external facing APIs to satisfy CMS requirements due 1/1/2027. Perform an analysis of options for patient/member consent workflows that complies with CMS-0057-Final for informed design of either in scope solution or a change request, specifically for Payer to Payer API and Provider Access API workstreams.  |   |            |
| <b>Schedule</b>                    | <b>NEEDS LEADERSHIP INTERVENTION</b>                                |  | The project began on February 2, 2025, with the following anticipated completion dates: the Improved Prior Authorization set for a January 2026 Go Live, and the API implementation is scheduled for a January 2027 Go Live. This timeline aims to complete all implementation and project activities, meeting all federal certification requirements. However, components associated with Improved Prior Authorization functionality, originally planned for the January 2026 Go Live have been delayed to March 2026 due to development setbacks from the vendor, Gainwell. This delay will also affect the Provider Onboarding and SOV user training sessions, now expected to be completed by mid-April 2026. We are actively working to prevent any further |   |            |

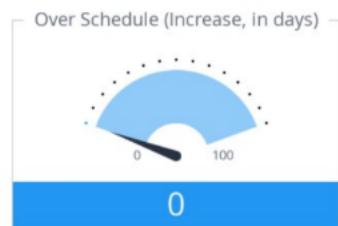
|   |   |  |
|---|---|--|
|   |   | delays in component readiness. Meanwhile, efforts related to the January 2027 API delivery will begin in January 2026 to ensure the solution is delivered on time and fully operational by the planned Go Live date in January 2027. |
| <b>Budget</b>   | <b>ON TRACK</b>                                     | Total estimated budget for implementation is \$3,957,578.06. Current implementations spend is \$147.2K representing approx. 4% of the total budget.  |
| <b>Overall</b>  | <b>MANAGEABLE RISKS</b>                             |  |
| <b>Scope Summary</b>  |   |  |
| <p>The business objective of this initiative is to support timely patient care for Vermonters by:</p> <ul style="list-style-type: none"> <li>• Reducing administrative burden for provider organizations via online tools for submitting prior authorization requests, and for receiving and viewing notices online including Prior Authorization Notices of Decision and medical necessity determination.</li> <li>• Providing new capabilities for providers to search for and view existing Prior Authorizations for patients, including supporting online submission of additional Prior Authorization information and resubmission of requests.</li> <li>• Streamlining operational processes for state clinical review and data entry of Prior Authorization requests, reducing administrative burden on state staff.</li> <li>• Increasing real-time management visibility for Prior Authorization responsiveness and other key metrics, to ensure determinations occur in compliance with federal and state regulations.</li> <li>• Supporting electronic system-to-system submission of Prior Authorization requests and responses, to provide further automation options for Prior Authorization processing for provider organizations and as one step towards Vermont State's compliance with CMS-0057-Final Rule for Interoperability and Prior Authorization.</li> </ul> |   |  |
| <b>Schedule Summary</b>   |   |  |
| <p>For the Prior Authorization Enhancement components, the Product Design, Development, and Implementation (DDI) phase is planned from July 2025 to February 2026. Provider Onboarding and SOV User Training will be conducted from February 2026 to April 2026. The project will transition to Maintenance and Operations (M&amp;O) between mid-March and April 2026, with the submission of CMS 0057 Final Rule prior authorization reporting metrics by March 2026. The API Design, Development, and Implementation phase is scheduled from January 2026 through December 2026, with the final project closeout anticipated by January 2027</p>  |   |  |
| <b>Budget Summary</b>   |   |  |
| <b>Total Original Estimated Implementation Cost</b>   | <b>Total Current Estimated Implementation Cost</b>  | <b>Budget Status – On Track, Over or Under Budget</b>  |
| \$3,957,578.06  | \$3,957,578.06                                      | <b>ON TRACK</b>  |
| <b>Total Original Estimated Operating Cost</b>  | <b>Total Current Estimated State Operating Cost</b> | <b>Budget Status – Over or Under Budget</b>  |
|   | 0   | <b>ON TRACK</b>  |

| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
|   | \$3,957,578.06                                 | ON TRACK                             |
| Solution Lifecycle Years                  | 5  |                                      |

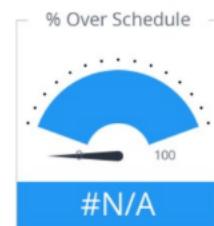
## Schedule Variance and Budget to Actuals Charts

### IPA PH2 Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



### IPA PH2 Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |  |                                     |   |                                  |           |
|-----------------------------------|--|-------------------------------------|---|----------------------------------|-----------|
| Project Name                      | AHS DVHA MMIS Medicaid Data Warehouse & Analytic Solution (MDWAS)  |                                     |   |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Acces |                                     | Current Project Phase   |                                  | Execution |
| Original Project Start Date       | 1/10/2022  | Original Project Estimated End Date | 12/23/2029  | Number of Change Orders Approved | 7         |
| Actual Start Date                 | 8/7/2023   | Current Estimated End Date          | 12/23/2025  |                                  |           |
| Project                           | Status   |                                     | Update  |                                  |           |
| Scope                             | ON TRACK   |                                     | The Medicaid Data Warehouse and Analytics Solution (MDWAS) project remains on track and aligned with its goal of improving Vermont's ability to integrate and analyze Medicaid data. Over the past year, the team has continued to enhance the Medicaid Data Lake (MDL), deployed initial phases of the Analytics Data Warehouse (ADW) and Data Analytics and Reporting (DAR) solutions, and continued onboarding users into the new environment. The project is currently engaged in a large-scale testing effort to ensure all newly developed analytics are user-friendly, accurate, and fully meet stakeholder needs. The team remains focused on delivering all baseline functionality by the end of the year while strengthening data integration, accessibility, and security. |                                  |           |
| Schedule                          | ON TRACK   |                                     | The MDWAS project began on January 10, 2022, with an implementation completion date of July 31, 2026. This will mark the close of all implementation and project activities and fulfillment of all federal certification requirements. Maintenance and Operations (M&O) are already underway for components that have gone live, ensuring continuity and support while additional functionality continues to be deployed. The core solution that meets all foundational project requirements remains on track for delivery by the end of 2025 through a series of ongoing deployments that balance flexibility and responsiveness with disciplined milestone management. The solution will continue to evolve beyond December 2025 with new analytics and reporting                   |                                  |           |

|   |   |   |
|---|---|---|
|   |   | capabilities, and the project includes baseline scope and funds to sustain and expand these capabilities through December 2029.   |
| Budget  | MANAGEABLE RISKS                                      | Total estimated budget for implementation is \$66,250,973.94. Current implementation spend is \$20,171,613.71 representing 30.45% of the total budget. The project is currently operating in alignment with the expected burn rate. |
| Overall   | ON TRACK  |   |
| <b>Scope Summary</b>  |   |   |
| <p>The AHS DVHA MMIS Medicaid Data Warehouse and Analytic Solution (MDWAS) will modernize how Vermont manages and uses Medicaid data. It will establish a secure, centralized platform for storing and analyzing claims, payments, and clinical information, making data easier to access, more accurate, and more actionable. MDWAS empowers stakeholders with user-friendly tools to analyze data and drive informed decisions while strengthening privacy protections and regulatory compliance. By integrating clinical and administrative data, the project delivers a comprehensive view of Medicaid services to improve care coordination and outcomes. Ultimately, MDWAS will transform how Vermont uses Medicaid data to enhance efficiency, transparency, and service quality for residents.</p>  |   |   |
| <b>Schedule Summary</b>   |   |   |
| <p>Project Design, Development, and Implementation (DDI) runs from August 2023 through December 2025. The Medicaid Data Lake (MDL) went live in October 2024, establishing the foundation for comprehensive, high-quality data sourcing. The Analytics Data Warehouse (ADW) delivered its first major release in July 2025, providing the data needed to meet most federal, state, and internal reporting requirements, with a second release in December 2025 focused on interoperability and integration of clinical and claims data. The Data Analytics and Reporting (DAR) solution completed its July and September 2025 releases, establishing foundational reporting and ad hoc analytics, with incremental releases expanding reporting to include additional federal, state, general, and advanced analytics capabilities. The project transitions to maintenance and operations (M&amp;O) in January 2026, with CMS Certification targeted for July 2026 and final closeout by December 2029.</p> |   |   |
| <b>Budget Summary</b>   |   |   |
| <b>Total Original Estimated Implementation Cost</b>   | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b>   |
| \$63,513,862.01   | \$63,513,862.01                                       | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>  | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>   |
| \$49,627,254  | \$49,627,254  | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>  | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>   |
| \$113,141,116.01  | \$113,141,116.01                                      | ON TRACK  |
| <b>Solution Lifecycle Years</b>   | 5   |   |

## Schedule Variance and Budget to Actuals Charts

### AHS MMIS MDWAS Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



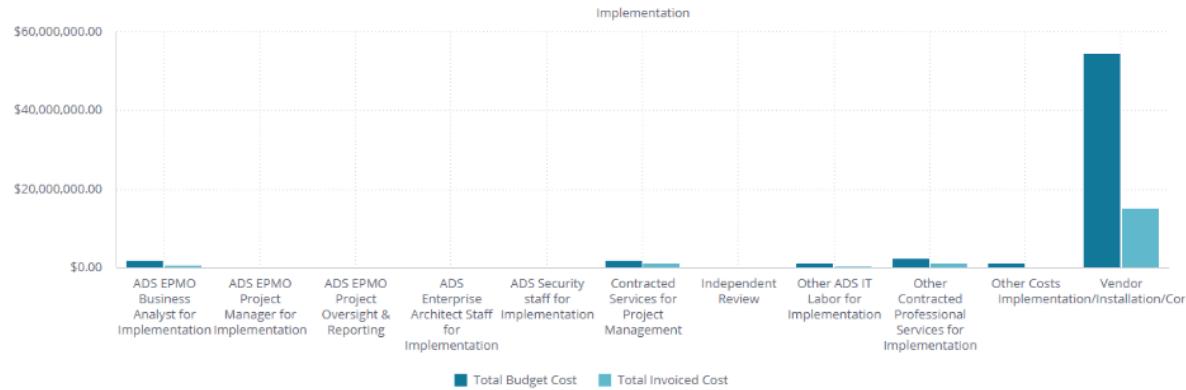
#### Schedule Estimates

| Estimate Name                                   | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|---|-------------------------|--------------------|------------------|---|
| Baseline 2 Estimated Project Start-Finish Dates | Baseline 2              | 1/10/22            | 12/24/29         | Because of the funding model for this project, the project implementation duration was extended out to the end of the full contract with the solution provider. Implementation of the three main components of the solution will be effectively completed on January 6, 2026, followed by a six-month transition period to maintenance and operations during certification. |
| Baseline 1 Estimated Project Start-Finish Dates | Baseline at Contracting | 1/10/22            | 7/20/26          | Implementation schedule defined in contract at execution.   |
| Initial Estimated Project Start-Finish Dates    | Initial Estimate        | 1/10/22            | 6/12/25          | Initial estimate at IT ABC Version 1  |

### AHS DVHA MMIS MDWAS Budget Summary

Actual Project Costs through September 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |                                |                                     |  |                                  |           |
|-----------------------------------|--------------------------------|-------------------------------------|--|----------------------------------|-----------|
| Project Name                      | AHS IEE Noticing Solution      |                                     |  |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) |                                     | Current Project Phase  |                                  | Execution |
| Original Project Start Date       | 1/27/2022                      | Original Project Estimated End Date | 6/1/2026   | Number of Change Orders Approved | 4         |
| Actual Start Date                 | 7/20/2023                      | Current Estimated End Date          | 6/1/2026   |                                  |           |
| Project                           | Status                         |                                     | Update   |                                  |           |
| Scope                             | MANAGEABLE RISKS               |                                     | The project scope remains clearly defined and stable. The Project Charter was updated in September 2026 to reflect revised financial tables and an updated Design, Development, and Implementation (DDI) milestones.   |                                  |           |
| Schedule                          | ON TRACK                       |                                     | The project remains on track and continues to achieve key milestones. The Customer Communication Management System (CCMS) contract was executed on October 1, 2025, with the contractor kickoff scheduled for November 3, 2025. In parallel, Workstream 2—focused on migrating notices to a centralized repository—has successfully completed User Acceptance Testing, with Go-Live anticipated in October 2026.   |                                  |           |
| Budget                            | ON TRACK                       |                                     | The project's financials remain within the approved budget parameters. The "At Contracting" ITABC was approved on September 2, 2025, establishing an implementation budget of \$8,389,593.08, of which \$6,007,284.28 is allocated to the Customer Communication Management System (CCMS) Contractor for configuration, installation, and implementation activities. Following approval of Decision 39, the Workstream 2 Statement of Work was amended, increasing the ITABC implementation budget by approximately \$292,000. As of this reporting period, 88% of the overall implementation budget remains available. The post-Go-Live Maintenance and Operations (M&O) budget totals \$6,182,097, including \$5,817,298 dedicated to vendor hosting and ongoing maintenance services. |                                  |           |
| Overall                           | ON TRACK                       |                                     |  |                                  |           |
| Scope Summary                     |                                |                                     |  |                                  |           |

The project will implement a modern Customer Communication Management System to streamline the generation, and delivery of notices. The solution will replace legacy systems, allow for extensibility, and integrate with OnBase for archival purposes (to include all historical artifacts). Out-of-scope items include noticing enhancements outside of foreign language translations capabilities.

#### Schedule Summary

Due to a shift in mandated technology requirements at the beginning of calendar year 24' a new iteration of the RFP was requested and the schedule was baselined. The Design, Development, and Implementation (DDI) phase officially begins with contractor kickoff on November 3, 2025, following contract execution on October 1, 2025. Over the next year, the team will conduct Joint Application Design (JAD) sessions, system configuration, and testing cycles leading up to User Acceptance Testing in mid-2026. Final Go-Live and transition to Maintenance and Operations remain targeted for December 2026.

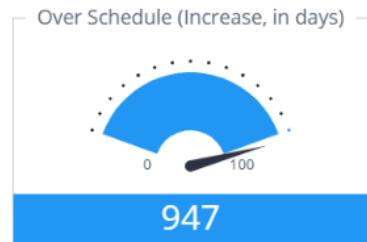
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$8,681,593.08                               | \$8,681,593.08                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$6,182,097                                  | \$6,182,097                                    | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$14,863,690.08                              | \$14,863,690.08                                | ON TRACK                                       |
| <b>Solution Lifecycle Years</b>              | 5  |  |

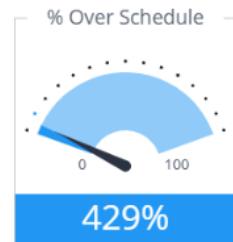
## Schedule Variance and Budget to Actuals Charts

### IEENTC Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



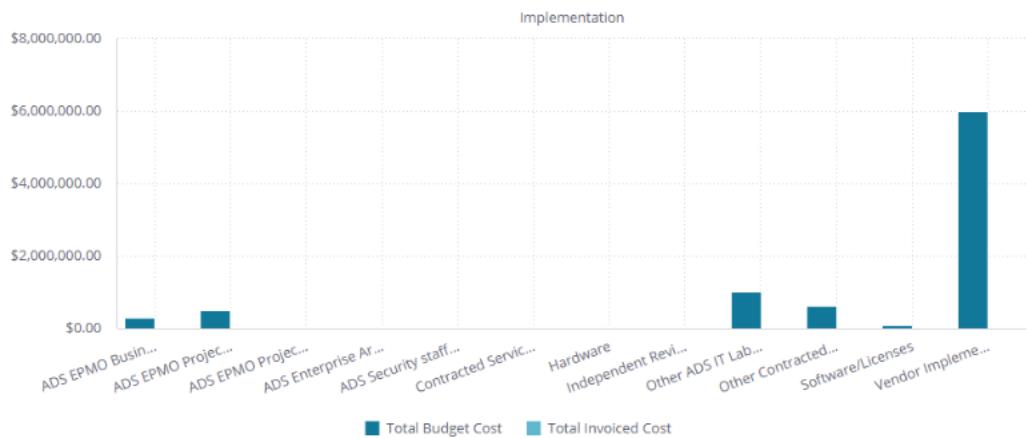
#### Schedule Estimates

| Estimate Name                              | Estimate Stage          | Change Date | Project Start Date | Project End Date | Change Narrative              |
|--|-------------------------|-------------|--------------------|------------------|-------------------------------|
| Baseline at Contracting Start-Finish Dates | Baseline at Contracting | 11/24/25    | 5/27/22            | 1/1/27           | Baseline scheduled develop... |

### IEENTC Annual Report Budget Summary

Actual Project Costs through November 2025

#### Budgeted vs Actual Invoiced Implementation Costs



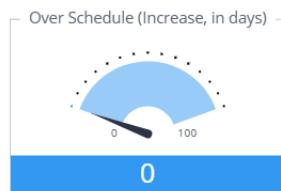
| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |                                     |  |                                  |           |  |  |  |  |  |
|--|--|-------------------------------------|--|----------------------------------|-----------|--|--|--|--|--|
| Project Name   | AHS VDH Medical Practice Board Licensing Sys Replacement (MBL) |                                     |  |                                  |           |  |  |  |  |  |
| Agency/Department  | Agency of Human Services (AHS) Department of Health            |                                     | Current Project Phase  |                                  | Execution |  |  |  |  |  |
| Original Project Start Date  | 8/14/2023  | Original Project Estimated End Date | 5/1/2026   | Number of Change Orders Approved | 2         |  |  |  |  |  |
| Actual Start Date  | 1/24/2025  | Current Estimated End Date          | 5/1/2026   |                                  |           |  |  |  |  |  |
| Project  | Status   |                                     | Update   |                                  |           |  |  |  |  |  |
| Scope  | ON TRACK   |                                     | The project is currently in the execution stage, with sprint 4 of 6 underway. We are on track to meet our timeline, with an expected go-live date on or before March 27, 2026.   |                                  |           |  |  |  |  |  |
| Schedule   | ON TRACK   |                                     | The project is currently in the execution stage, with sprint 4 of 6 underway. We are on track to meet our timeline, with an expected go-live date on or before March 27, 2026.   |                                  |           |  |  |  |  |  |
| Budget   | ON TRACK   |                                     | The project remains within the originally planned budget, with one exception: a change request for automated address validation. This service incurs an annual subscription fee of \$2,300, resulting in a \$11,500 cost increase over the 5-year contract term. The automated address validation enhances efficiency and consistency in operations. |                                  |           |  |  |  |  |  |
| Overall  | ON TRACK   |                                     |  |                                  |           |  |  |  |  |  |
| <b>Scope Summary</b>   |  |                                     |  |                                  |           |  |  |  |  |  |
| The Agency of Human Services (AHS) Medical Practice Board Licensing (MBL) project is the procurement of a new Software as a Service (SaaS) solution to migrate from the current licensing system to an implementation of a new system that includes all desired features and configuration of the current system to Vermont specific data and workflow requirements. |  |                                     |  |                                  |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |  |                                     |  |                                  |           |  |  |  |  |  |
| The project is on track according to the original plan, with a targeted go-live date on or before March 27, 2026.  |  |                                     |  |                                  |           |  |  |  |  |  |
| <b>Budget Summary</b>  |  |                                     |  |                                  |           |  |  |  |  |  |
| Total Original Estimated Implementation Cost   | Total Current Estimated Implementation Cost                    |                                     | Budget Status – On Track, Over or Under Budget   |                                  |           |  |  |  |  |  |

|  |   |   |
|--|---|---|
| \$1,427,486.71                                   | \$1,442,006.71  | ON TRACK                                    |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b> |
| \$1,221,903.10                                   | \$1,221,903.10  | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
| \$2,649,389.81                                   | \$2,663,909.81  | ON TRACK                                    |
| <b>Solution Lifecycle Years</b>                  | 5   |   |

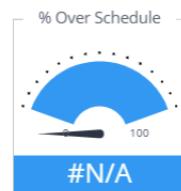
## Schedule Variance and Budget to Actuals Charts

### MBL Schedule Variance

Initial Estimate to Current Baseline



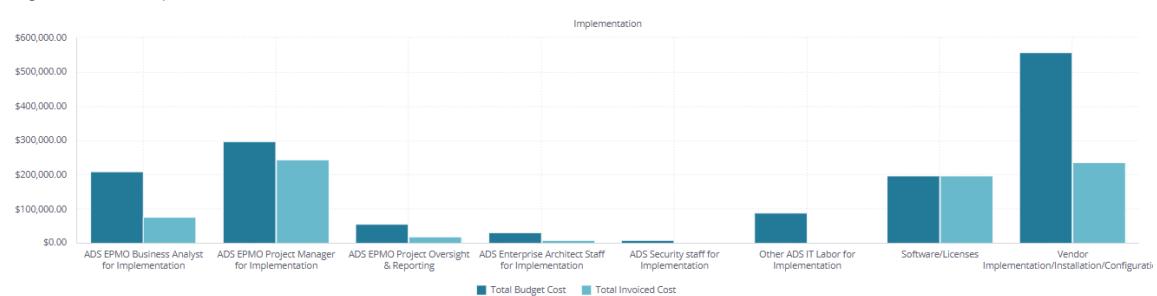
Initial Estimate to Current Baseline



### MBL Annual Report Budget Summary

Actual Project Costs through November 2025

#### Budgeted vs Actual Invoiced Implementation Costs



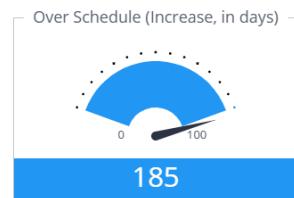
| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |  |  |                                  |         |  |  |  |  |  |
|---|---|--|--|----------------------------------|---------|--|--|--|--|--|
| Project Name  | AHS VDH StarLIMS System Upgrade                     |  |  |                                  |         |  |  |  |  |  |
| Agency/Department   | Agency of Human Services (AHS) Department of Health |  |  | Current Project Phase            | Closing |  |  |  |  |  |
| Original Project Start Date   | 2/8/2022  | Original Project Estimated End Date            | 4/30/2025  | Number of Change Orders Approved | 7       |  |  |  |  |  |
| Actual Start Date   | 4/10/2023   | Current Estimated End Date                     | 4/30/2025  |                                  |         |  |  |  |  |  |
| Project   | Status  |  | Update   |                                  |         |  |  |  |  |  |
| Scope   | ON TRACK  |  | The StarLIMS v12 upgrade was successfully launched on February 10, 2025.   |                                  |         |  |  |  |  |  |
| Schedule  | MANAGEABLE RISKS                                    |  | The project schedule was adjusted due to an extended period required for document reviews and the incorporation of change orders. As a result, the project completion date was moved from the original target of July 31, 2024, to April 30, 2025. |                                  |         |  |  |  |  |  |
| Budget  | ON TRACK  |  | The budget was increased to accommodate additional project management and VDH-IT costs resulting from the project extension. However, the project completed below the rebaselined costs.   |                                  |         |  |  |  |  |  |
| Overall   | ON TRACK  |  |  |                                  |         |  |  |  |  |  |
| Scope Summary   |   |  |  |                                  |         |  |  |  |  |  |
| The AHS VDH StarLIMS System Upgrade project has been successfully completed, marking a significant enhancement in the security, performance, and functionality of the Vermont Department of Health Laboratory's Laboratory Information Management System (LIMS). By upgrading to the latest version, the VDHL now operates on a modern and secure platform. |   |  |  |                                  |         |  |  |  |  |  |
| The project focused on implementing critical improvements to maintain system security and compliance. With the upgrade, the latest security measures have been integrated, ensuring that the system meets necessary compliance standards and safeguarding sensitive laboratory data against potential security threats.                                     |   |  |  |                                  |         |  |  |  |  |  |
| Schedule Summary  |   |  |  |                                  |         |  |  |  |  |  |
| The project successfully went live on February 10, 2025.  |   |  |  |                                  |         |  |  |  |  |  |
| Budget Summary  |   |  |  |                                  |         |  |  |  |  |  |
| Total Original Estimated Implementation Cost  | Total Current Estimated Implementation Cost         | Budget Status – On Track, Over or Under Budget |  |                                  |         |  |  |  |  |  |

|  |   |   |
|--|---|---|
| \$1,011,067.50                                   | \$1,258,909.50  | OVER BUDGET                                 |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b> |
| \$1,300,000                                      | \$1,300,000   | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
| \$2,311,067.50                                   | \$2,558,909.50  | OVER BUDGET                                 |
| <b>Solution Lifecycle Years</b>                  | 5   |   |

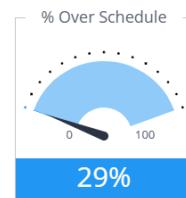
#### Schedule Variance and Budget to Actuals Estimate

##### AHS VDH StarLIMS Upgrade Schedule Variance

Initial Estimate to Current Baseline

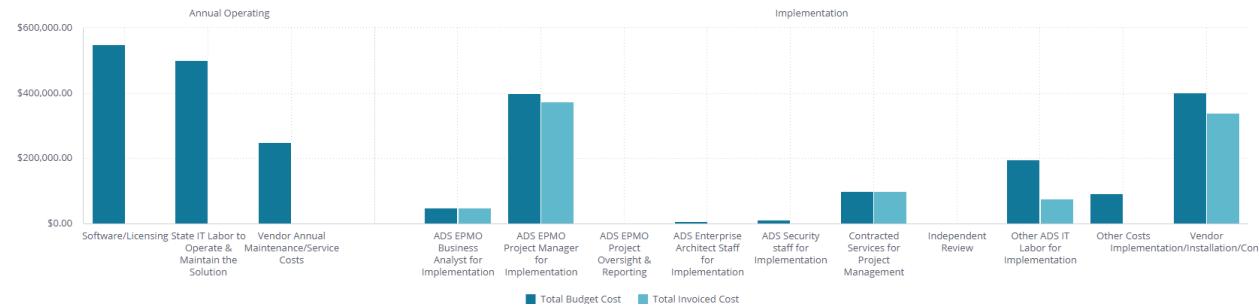


Initial Estimate to Current Baseline



**AHS VDH StarLIMS Upgrade Budget Summary**  
 Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |   |                                  |           |
|-----------------------------------|---|-------------------------------------|---|----------------------------------|-----------|
| Project Name                      | AHS DVHA HIE - VHIE Connectivity SFY26                              |                                     |   |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase   |                                  | Execution |
| Original Project Start Date       | 8/1/2025  | Original Project Estimated End Date | 7/31/2026   | Number of Change Orders Approved | 0         |
| Actual Start Date                 | 8/1/2025  | Current Estimated End Date          | 7/31/2026   |                                  |           |
| Project                           | Status  |                                     | Update  |                                  |           |
| Scope                             | ON TRACK  |                                     | <p>The scope of VHIE Connectivity project is currently on track, with all deliverables progressing according to the approved scope and timeline in the SFY26 VITL Contract. The SFY26 August Connectivity Dashboard Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. The Deliverables Expectations Documents for the following work streams have been approved: Contributing Interfaces, Results Delivery Interfaces Expand Bi-Directional Interfaces, Expand ELR interfaces. Connect to AIRA AART system, Convert batch Immunization files to HL7, Implement Newborn screening HL7 Interface, Design and Implement recommended solution for adding Insurance information</p> <p>VDH and VITL MOU agreement is currently routing for signatures. Scope risk exposure is currently low, with ongoing monitoring in place to proactively address potential issues and maintain smooth project progression.</p> |                                  |           |
| Schedule                          | ON TRACK  |                                     | <p>VHIE Connectivity project schedule is currently on track, with all deliverables progressing according to the approved scope and timeline. The SFY26 August Connectivity Dashboard Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. Connectivity Deliverables Expectations Documents</p>   |                                  |           |

|  |  |   |
|--|--|---|
|  |  | development has been completed in September on schedule. Public Health Deliverables Expectations Documents development is on track and will be finalized in November. Bi-Weekly Progress status reports from the vendor are on track.   |
| <b>Budget</b>  | <b>ON TRACK</b>                                    | Budget performance remains aligned with projections and the contract obligations. Payments are based on the review of the Monthly Connectivity Dashboard deliverable, Bi -Weekly Status Reports, and upon completion Interface and Public Health deliverables. Acceptance of monthly and upon completion deliverables, invoices are paid based on the Deliverables Acceptance Documents, with the next milestone, VITL invoice for SFY26 September Deliverables expected during the week of 11/3. |
| <b>Overall</b>   | <b>ON TRACK</b>                                    |   |
| <b>Scope Summary</b>   |  |   |
| <p>This scope includes expanding the number and types of data contributors and ensuring that patients and providers have meaningful access to health information through direct EHR integrations, care coordination platforms, and a clinician-facing portal. In alignment with federal regulations such as the CMS Interoperability and Patient Access Final Rule and ONC's USCDI requirements, the project emphasizes enabling FHIR API connectivity for both organizational and individual users. These APIs will allow secure and standardized bidirectional exchange of health records, ensuring VHIE stakeholders and patients can electronically access and share data as required.</p> <p>To strengthen public health collaboration, the project advances the bidirectional exchange of immunization and reportable condition data between the VHIE and the Vermont Department of Health. This includes expanding the Immunization Bidirectionality (IBID) program, enhancing Electronic Lab Reporting (ELR) interfaces, and connecting to national immunization analysis tools like AIRA's AART. Additional deliverables include HL7 conversions for batch data senders, newborn screening integration, and sharing insurance information to support vaccine distribution planning. All interface development will adhere to NIST and VDH specifications, ensuring compliance, data quality, and real-time value at the point of care.</p> <p>The project scope also includes managing the development and review of Deliverables Expectations Documents (DEDs), overseeing the tracking, completion, and review of monthly, quarterly, and final deliverables, producing, reviewing, and approving Deliverables Acceptance Documents, facilitating communication and coordination with VITL and other stakeholders, and executing risk management activities to support project continuity and accountability.</p> |  |   |
| <b>Schedule Summary</b>  |  |   |
| <p>The schedule for the DDI deliverables will follow a DED process</p>   |  |   |
| <b>Budget Summary</b>  |  |   |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b> | <b>Budget Status – On Track, Over or Under Budget</b>   |

|  |   |   |
|--|---|---|
| \$1,548,542                                      | \$1,548,542   | ON TRACK                                    |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b> |
| 0  | 0   | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
| \$1,548,542                                      | \$1,548,542   | ON TRACK                                    |
| <b>Solution Lifecycle Years</b>                  | 1   |   |

#### Schedule Variance and Budget to Actuals Charts

#### AHS VHIE Connectivity 2025 Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

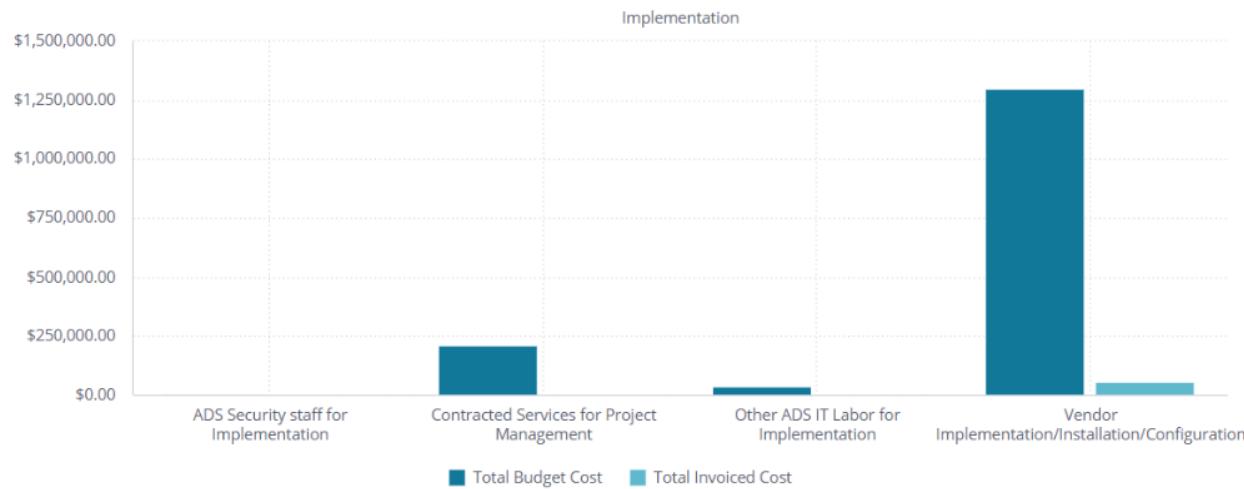
% Over Schedule

#N/A

## AHS VHIE Connectivity 2025 Budget Summary

Actual Project Costs through November 2025

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |           |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|-----------|
| Project Name                      | AHS VHIE -Maintenance & Operations SFY26                            |                                     |  |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase  |                                  | Execution |
| Original Project Start Date       | 8/1/2025  | Original Project Estimated End Date | 7/31/2026  | Number of Change Orders Approved | 0         |
| Actual Start Date                 | 08/01/2025  | Current Estimated End Date          | 7/31/2026  |                                  |           |
| Project                           | Status  |                                     | Update   |                                  |           |
| Scope                             | ON TRACK  |                                     | The scope of VHIE MO project is currently on track, with all deliverables progressing according to the approved scope and timeline. The SFY26 August Deliverables review has been completed, and the associated milestone was achieved on schedule on 9/30; we do not anticipate any delays or disruptions with monthly or upon completion deliverables at this stage. Deliverables Expectations Documents development is currently in progress and on schedule. Outcomes based certification metrics are now reported monthly due to the changes in required CMS reporting. This has been reflected in the SFY26 Contract Amendment executed on August 8, 2025. |                                  |           |
| Schedule                          | ON TRACK  |                                     | Schedule is on track. Monthly Deliverables are received for review on the 10th of each month and upon completion deliverables are following the schedule defined and approved in the Deliverables Expectations Documents. Outcomes based certification metrics are now received monthly due to the changes in required CMS reporting.  |                                  |           |
| Budget                            | ON TRACK  |                                     | Budget performance remains aligned with projections and the contract obligations. Payments are based on the review and acceptance of monthly and upon completion deliverables, invoices are paid based on the Deliverables Acceptance Documents , with the next milestone, VITL invoice for SFY26 September Deliverables expected during the week of 11/3.   |                                  |           |
| Overall                           | ON TRACK  |                                     |  |                                  |           |

### Scope Summary

The AHS VHIE Maintenance & Operations project plays a crucial role in ensuring the smooth operation and compliance of the Vermont Health Information Exchange (VHIE). By managing all aspects of the VITL Sole Source Contract for the SFY25/SFY26 operations and maintenance, HIE Program is committed to maintaining the integrity and effectiveness of VHIE. Overall, the project ensures VHIE receives the support needed for its ongoing operation, benefiting healthcare providers and patients in Vermont by facilitating seamless health information exchange and supporting better healthcare outcomes.

#### 2025-2026 Deliverables:

VHIE System Operations (Monthly): The contractor will ensure the smooth running of the VHIE by maintaining its technical infrastructure, software, hardware, and architecture and meeting all service and operational requirements to demonstrate efficient and effective system operation.

Collaborative Services Architecture (Monthly and Upon Completion): Continue to support the Medicaid Data Warehouse & Analytics Solution (MDWAS) scope and as supported by contract budget. This will include VHIE- related support for CMS certification of the MDWAS.

Scope includes · Managing Development of the Deliverables Expectations Documents

Managing and Reviewing Monthly and Quarterly and Upon Completion Deliverables and ensuring federal and state compliance via Outcome Based Certification (OBC) Measures.

### Schedule Summary

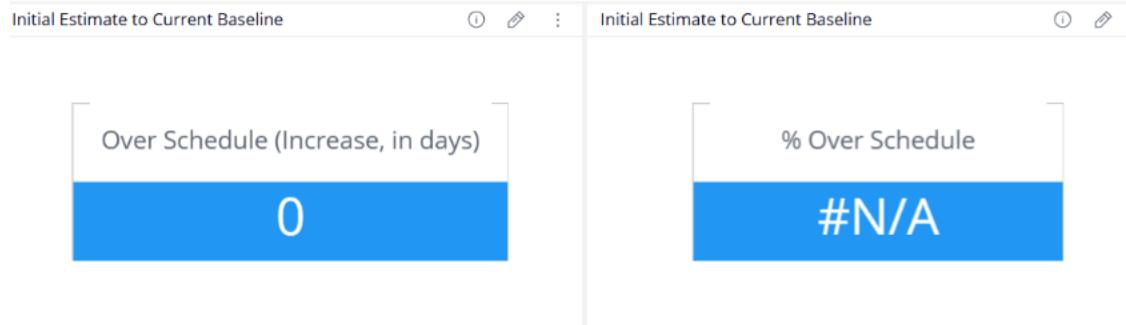
Project is currently on track and the latest milestone deliverables received on time

### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$586,000                                    | \$586,000                                      | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$5,923,894.16                               | \$5,923,894.16                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$6,509,894.16                               | \$6,509,894.16                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 1  |  |

## Schedule Variance and Budget to Actuals Charts

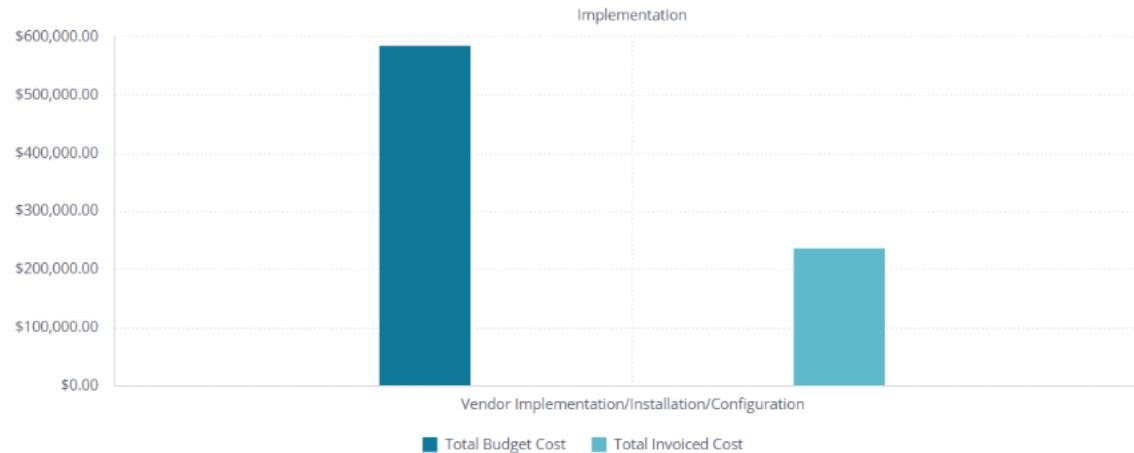
### AHS VHIE M&O 2025 Project Schedule Variance



### AHS VHIE M&O 2025 Budget Summary

Actual Project Costs through November 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |   |                                  |           |
|-----------------------------------|---|-------------------------------------|---|----------------------------------|-----------|
| Project Name                      | AHS VHIE -MDAAP and SLAIT SFY26                                     |                                     |   |                                  |           |
| Agency/Department                 | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase   |                                  | Execution |
| Original Project Start Date       | 7/1/2025  | Original Project Estimated End Date | 3/31/2026   | Number of Change Orders Approved | 0         |
| Actual Start Date                 | 7/1/2025  | Current Estimated End Date          | 3/31/2026   |                                  |           |
| Project                           | Status  |                                     | Update  |                                  |           |
| Scope                             | ON TRACK  |                                     | <p>Project scope remains firmly aligned with the approved MDAAP objectives and MDAAP Payment Protocol and no new scope changes have been introduced. Scope execution risk is low, and alignment between the State and VITL continues to track accordingly. MDAAP has stopped accepting new applications for connectivity tracks. There will be a November deadline for participants in Track 5, VITL Access. Providers continue to work towards milestones within their enrolled track.</p> <p>VITL continues facilitating Security Risk Assessments of providers' EHRs and workspace. MDAAP Audit Plan:</p> <p>Risk assessments for the 1st round of audits have been completed and documented in a case management database, following MDAAP Audit Plan procedures. Audits are in process and supporting documentation is being gathered. Documentation is saved in an audit specific folder, and standardized templates are being used to review program eligibility and milestones.</p> |                                  |           |
| Schedule                          | ON TRACK  |                                     | <p>The VHIE MDAAP and SLAIT SFY26 project is currently on track, with all deliverables progressing according to the approved timeline. There are no anticipated delays or disruptions with monthly or upon completion deliverables at this stage. Milestones must be attested to by December 1st, 2025, and all correct documentation must be submitted by December 15, 2025.</p> <p>Deliverables Expectations Document for the SFY26 contract scope is currently under review with the MDAAP State Team with the</p>   |                                  |           |

|                |                 |   |
|----------------|-----------------|---|
|                |                 | plans to finalize the review by 10/31. Bi-Weekly Progress status reports from the vendor are on track.  |
| <b>Budget</b>  | <b>ON TRACK</b> | Budget performance remains aligned with projections and contractual obligations. Payments continue to be based on the acceptance of monthly and upon-completion deliverables under the existing VITL agreement. |
| <b>Overall</b> | <b>ON TRACK</b> |   |

#### Scope Summary

The scope of the Medicaid Data Aggregation and Access Program (MDAAP) and State Level Repository, Attestation, and Incentive Tracking System (SLAIT) SFY26 Project focuses on improving connectivity and data sharing among Medicaid providers, particularly those in mental health, substance use, long-term services and supports, and school-based electronic medical record (EMR) systems, while reducing provider burden and supporting care coordination. The project scope includes establishing interface connectivity, data integration into the VHIE, aiding with the security risk assessments, executing service agreements, supporting onboarding activities and training for providers and supervisory units to use health data effectively and securely. Scope also includes project management support for State Level Repository, Attestation, and Incentive Tracking System maintenance and operations, the system used to properly track and report on EHR incentives paid out by MDAAP.

#### Schedule Summary

The schedule for the DDI deliverables will follow a DED process

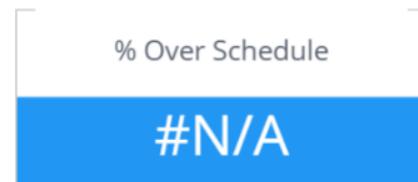
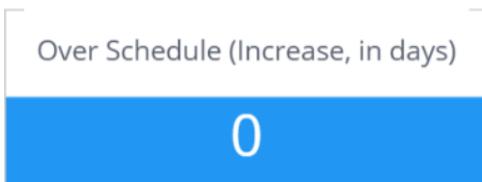
| Budget Summary                                      |   |   |
|---|---|---|
| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
| \$398,825   | \$398,825   | <b>ON TRACK</b>                                       |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
| \$22,514  | \$22,514  | <b>ON TRACK</b>                                       |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$421,339   | \$421,339   | <b>ON TRACK</b>                                       |
| <b>Solution Lifecycle Years</b>                     | <b>1</b>  |   |

## Schedule Variance and Budget to Actuals Charts

### AHS VHIE MDAAP and SLAIT 2025 Project Schedule Variance

Initial Estimate to Current Baseline

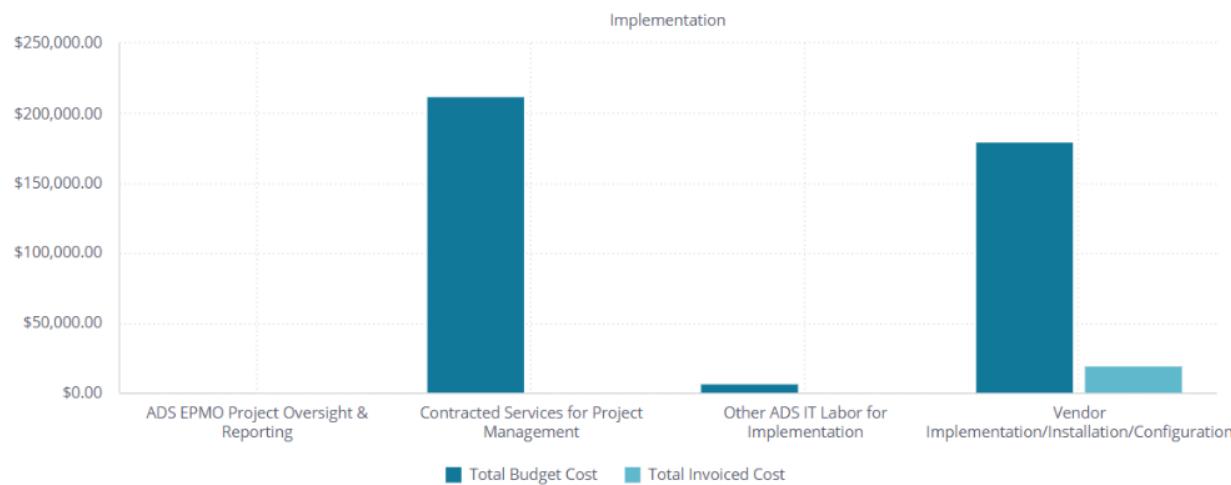
Initial Estimate to Current Baseline



### AHS VHIE MDAAP and SLAIT 2025 Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |                                     |  |                                  |           |  |  |  |  |  |
|---|---|-------------------------------------|--|----------------------------------|-----------|--|--|--|--|--|
| Project Name  | AHS VHIE Unified Health Data Space (UHDS)                           |                                     |  |                                  |           |  |  |  |  |  |
| Agency/Department   | Agency of Human Services (AHS) Department for Vermont Health Access |                                     | Current Project Phase  |                                  | Execution |  |  |  |  |  |
| Original Project Start Date   | 7/1/2025  | Original Project Estimated End Date | 6/30/2026  | Number of Change Orders Approved | 0         |  |  |  |  |  |
| Actual Start Date   | 7/1/2025  | Current Estimated End Date          | 6/30/2026  |                                  |           |  |  |  |  |  |
| Project   | Status  |                                     | Update   |                                  |           |  |  |  |  |  |
| Scope   | ON TRACK  |                                     | Project scope remains firmly aligned with the approved UHDS objectives and no new scope changes have been introduced. All paused deliverables have resumed review following vendor selection, and the governance framework is being finalized to ensure clear State oversight. Scope execution risk is low, and alignment between the State and VITL continues to track accordingly.                                     |                                  |           |  |  |  |  |  |
| Schedule  | MANAGEABLE RISKS  |                                     | The project experienced a short delay in vendor selection due to extended due diligence and governance alignment. This risk and issue are actively managed through joint AHS–VITL coordination and the issue is close to being resolved with final vendor selection in late September. Contracting preparation is now underway, and the overall project timeline remains stable with minimal downstream impact expected. |                                  |           |  |  |  |  |  |
| Budget  | ON TRACK  |                                     | Budget performance remains aligned with projections and contractual obligations. Expenditures to date are limited to procurement and pre-implementation activities, with no cost variances reported. Payments continue to be based on the acceptance of monthly and upon-completion deliverables under the existing VITL agreement.  |                                  |           |  |  |  |  |  |
| Overall   | ON TRACK  |                                     |  |                                  |           |  |  |  |  |  |
| Scope Summary   |   |                                     |  |                                  |           |  |  |  |  |  |
| The Unified Health Data Space (UHDS) represents Vermont's next generation Health Information Exchange, evolving from record exchange to a secure, multi-source data ecosystem. Its scope includes upgrading the VHIE platform with FHIR-based APIs, enhanced data repository and analytics capabilities, improved consent management, and stronger access controls such as SSO and MFA. Parallel efforts under VHIE Security focus on |   |                                     |  |                                  |           |  |  |  |  |  |

maintaining NIST 800-53 compliance, implementing FHIR-based security labeling, advancing toward MARS-E standards, and conducting regular risk assessments to protect patient data. Future activities tied to Act 167, S.126, and the AHEAD Model will also align under the UHDS framework to support Vermont's long-term health data strategy.

#### **Schedule Summary**

The schedule for the DDI deliverables will follow a DED process. For the NIST deliverables (Operations) VITL will follow a predetermined schedule as presented in the NIST Requirements table.

#### **Budget Summary**

| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
|---|---|---|
| \$3,191,200   | \$3,191,200   | <b>ON TRACK</b>                                       |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
| \$1,315,960.04                                      | \$1,315,960.04  | <b>ON TRACK</b>                                       |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$4,507,160.04                                      | \$4,507,160.04  | <b>ON TRACK</b>                                       |
| <b>Solution Lifecycle Years</b>                     | 1   |   |

## Schedule Variance and Budget to Actuals Charts

### Unified Health Data Space (UHDS) Project Schedule Variance

Last refreshed Dec 1 3:20 pm 

#### Unified Health Data Space (UHDS) Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



### Unified Health Data Space (UHDS) Annual Report Budget Summary

Last refreshed Dec 1 3:20 pm 

#### AHS VHIE Unified Health Data Space (UHDS) 2025 Annual Report Budget Summary

Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs





# Agency of Natural Resources (ANR)

| IT ACTIVITY ANNUAL SUMMARY REPORT   |  |  |  |   |           |  |  |  |  |  |
|---|--|--|--|---|-----------|--|--|--|--|--|
| <b>Project Name</b>   | ANR - FPR - Vermont State Parks Internet Services              |  |  |   |           |  |  |  |  |  |
| <b>Agency/Department</b>  | Agency of Natural Resources (ANR) Forests Parks and Recreation |  | <b>Current Project Phase</b>   |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>  | 6/1/2022   | <b>Original Project Estimated End Date</b> | 8/31/2026  | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>  | 7/30/2025  | <b>Current Estimated End Date</b>          | 8/31/2026  |   |           |  |  |  |  |  |
| <b>Project</b>  | <b>Status</b>  |  | <b>Update</b>  |   |           |  |  |  |  |  |
| <b>Scope</b>  | ON TRACK   |  | The project is in progress as the project team, vendor, and other interested parties are negotiating the contract and preparing to begin work through 2026.  |   |           |  |  |  |  |  |
| <b>Schedule</b>   | ON TRACK   |  | The project has returned to active project this year, and the schedule is currently on track for completion in late 2026.  |   |           |  |  |  |  |  |
| <b>Budget</b>   | ON TRACK   |  | The project is in process as the project team continues negotiations with the chosen vendor. The project has a budget of \$1.6 million, all of which is ARPA funds that need to be spent or lost by the end of calendar year 2026. The project has spent \$25,960.00 as of September, entirely on ADS costs. The plan for the contract is to establish project minimum deliverables, and expand the locations to receive fiber as the budget and calendar allow. |   |           |  |  |  |  |  |
| <b>Overall</b>  | ON TRACK   |  |  |   |           |  |  |  |  |  |
| <b>Scope Summary</b>  |  |  |  |   |           |  |  |  |  |  |
| <p>The ANR FPR VT State Parks Internet Services project is a significant initiative aimed at enhancing internet connectivity and support for all Vermont State Parks. By contracting with a single vendor, we aim to improve the reliability, performance, and overall quality of internet services provided to park visitors and staff. Reliable and high-quality internet connectivity is essential for enhancing the visitor experience at Vermont State Parks. It enables visitors to access online resources, stay connected with loved ones, and utilize digital tools for recreational and informational purposes. By improving internet services, we can enhance the overall park experience and meet the expectations of modern-day visitors. The project will focus on improving the reliability of internet connectivity, ensuring that visitors and staff have consistent access to the internet throughout the park grounds. This will involve implementing robust infrastructure and technologies to minimize downtime and disruptions. By enhancing reliability, we can provide a seamless and uninterrupted internet experience for park users. In addition to reliability, the project aims to improve the performance of internet services. This includes increasing internet speeds and bandwidth to accommodate the growing demand for online activities and services. By providing</p> |  |  |  |   |           |  |  |  |  |  |

faster and more efficient internet connectivity, we can enhance the overall user experience and support a wide range of digital applications and services. Furthermore, the project will ensure comprehensive support for internet services at Vermont State Parks. The contracted vendor will be responsible for coordinating and managing all aspects of internet services, including troubleshooting, maintenance, and technical support. This will provide park staff with a single point of contact for any internet-related issues, streamlining the support process and ensuring timely resolution of problems. The ANR FPR VT State Parks Internet Services project represents our commitment to enhancing connectivity and support for Vermont State Parks. By improving reliability, performance, and support of internet services, we aim to provide visitors and staff with a seamless and reliable online experience. This project will contribute to the overall enjoyment and accessibility of Vermont State Parks, supporting their mission to provide exceptional outdoor recreational opportunities for all. 91 We remain dedicated to implementing the necessary improvements and working closely with the contracted vendor to ensure the successful delivery of reliable and high-quality internet services to all Vermont State Parks. Through this project, we are enhancing connectivity and supporting the continued success of our state parks system.

#### Schedule Summary

The project has been restarted this year and the project team has made great progress. Bids for the project were received in April, the ADS PM was added to the team in June, and the winning vendor was chosen in August. Currently, the project team is working with the vendor on redlining before the IR begins this month. The overall project schedule is fairly straightforward, as the ARPA funds for this project must be spent by the end of calendar year 2026, giving us the majority of that year to complete all necessary construction and implementation efforts.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,544,186                                  | \$1,544,186                                    | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$274,447                                    | \$274,447                                      | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$1,818,633                                  | \$1,818,633                                    | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts

### ANR FPR Connectivity Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

0

% Over Schedule

0%

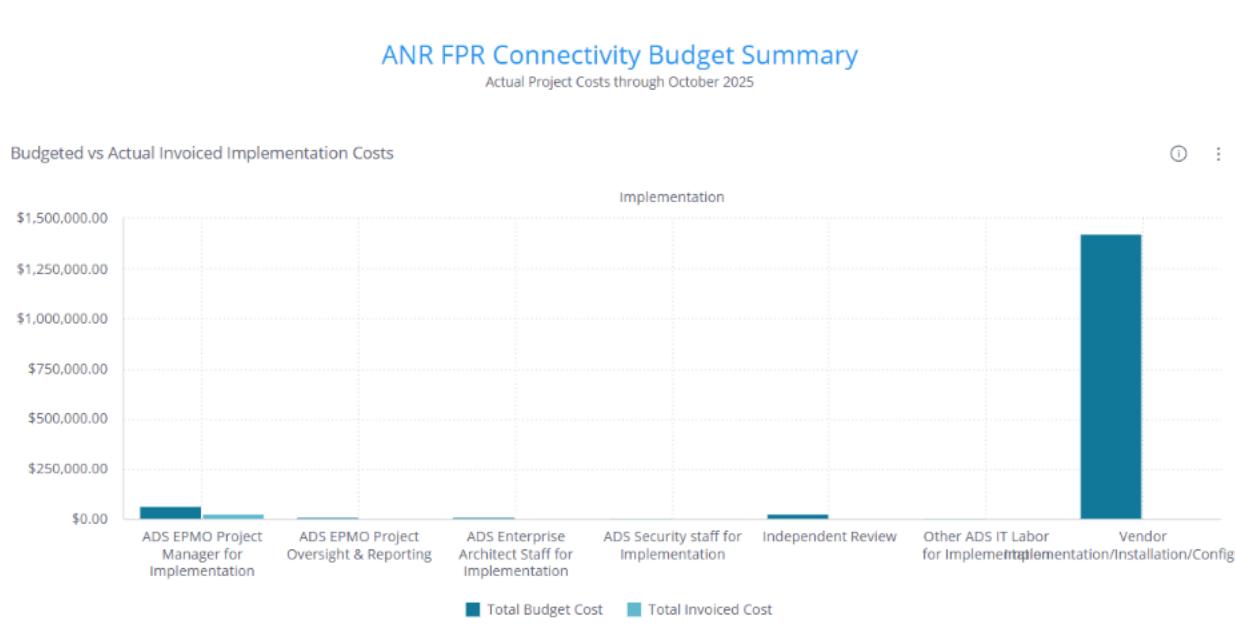
#### Schedule Estimates

| Estimate Name                                      | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                                     |
|--|-------------------------|--------------------|------------------|--|
| Estimated Project Start/Finish Dates @ Contracting | Baseline at Contracting | 6/1/22             | 12/31/26         | The project is on schedule with no changes required. |

### ANR FPR Connectivity Budget Summary

Actual Project Costs through October 2025

#### Budgeted vs Actual Invoiced Implementation Costs





# Agency of Transportation (AOT)

| IT ACTIVITY ANNUAL SUMMARY REPORT |  |                                     |  |                                  |           |
|-----------------------------------|--|-------------------------------------|--|----------------------------------|-----------|
| Project Name                      | AOT (VAMIS) Vermont Asset Management Information System. |                                     |  |                                  |           |
| Agency/Department                 | Agency of Transportation (AOT)                           |                                     | Current Project Phase  |                                  | Execution |
| Original Project Start Date       | 6/15/2018  | Original Project Estimated End Date | 12/30/2025   | Number of Change Orders Approved | 3         |
| Actual Start Date                 | 6/15/2018  | Current Estimated End Date          | 12/30/2025   |                                  |           |
| Project                           | Status   |                                     | Update   |                                  |           |
| Scope                             | ON TRACK   |                                     | Phase 1 and 2 of the project is finished and fully operational. In Phase 3, additional assets were integrated into the VAMIS system, and the Operations and Management (O&M) component was developed. The O&M component will enable the Agency to align the work of the Maintenance Districts with the overall asset investments across the network.   |                                  |           |
| Schedule                          | ON TRACK   |                                     | The project kicked off in February 2017, with the vendor implementation and support/maintenance contract signed in August 2019. The maintenance and operation part of this contract is scheduled to conclude in December 2030. During the implementation phase of the vendor contract, three amendments were made for phases 2(A), 2(B), and 3, extending the implementation efforts through December 2025. This extension covers 64 four-week sprints throughout the project's duration.  |                                  |           |
| Budget                            | ON TRACK   |                                     | The project was planned to be implemented in multiple phases. Initially, the cost baseline at the time of contract execution was set at \$2,395,317. Following the approval of the first vendor contract amendment, the total project budget increased to \$3,860,939. A second vendor contract amendment was approved, revising the budget to \$12,076,740. In December 2024, a third and final vendor contract amendment was executed, reflecting a minor budget increase due to ongoing ADS project oversight labor charges for the remaining implementation activities. Currently, project cost for October 2025 is \$11,958,288.13. |                                  |           |
| Overall                           | ON TRACK   |                                     |  |                                  |           |

### Scope Summary

The Vermont Asset Management Information System (VAMIS) project by the Agency of Transportation (AOT) is a major initiative designed to enhance asset tracking, management, and decision-making. By adopting a transportation asset management information system, the project aims to boost the efficiency and effectiveness of managing AOT program assets. This involves configuring the Deighton Asset Management Information System (dTIMS) to handle the asset data managed by AOT. The system will act as a centralized platform for tracking and analyzing various asset categories, such as Rail, Pavements, Short Structures, Small Culverts, and Signs. Consolidating asset data into a single system will streamline operations and improve data accuracy and accessibility.

The VAMIS project will also integrate Operation Management (O.M.) and Business Analytics (BA) modules, offering comprehensive analysis and reporting capabilities. These modules will facilitate detailed analysis of asset data, enabling informed decision-making and strategic planning. By utilizing business analytics, the project aims to identify trends, predict asset performance, and optimize resource allocation. Implementing VAMIS will allow AOT to incorporate asset data into business processes, enhancing operational efficiency and effectiveness. This data-driven approach will support informed decisions regarding asset maintenance, repair, and replacement, ensuring optimal performance and longevity of transportation systems. Building toward the right treatment, for the right asset, at the right time.

Additionally, the project seeks to increase the value of AOT assets by effectively managing and maintaining them, thereby maximizing their lifespan and minimizing lifecycle costs. This will lead to improved asset performance, reduced downtime, and enhanced overall reliability of the transportation system. The VAMIS project underscores the agency's commitment to leveraging technology and data to improve asset management and decision-making. By implementing a comprehensive asset management system, AOT is streamlining operations, enhancing data-driven decision-making, and increasing the value of its assets. The agency is dedicated to the successful implementation of VAMIS, ensuring it has the necessary tools and capabilities to effectively track, manage, and make informed decisions about transportation assets. Through this project, AOT is advancing asset management practices and supporting the efficient operation of Vermont's transportation systems.

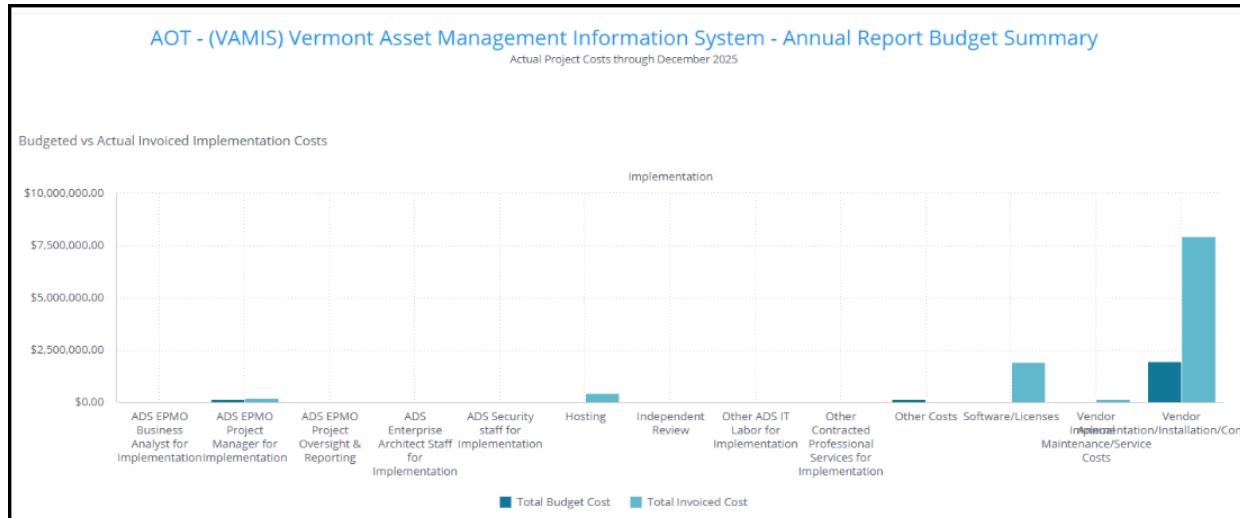
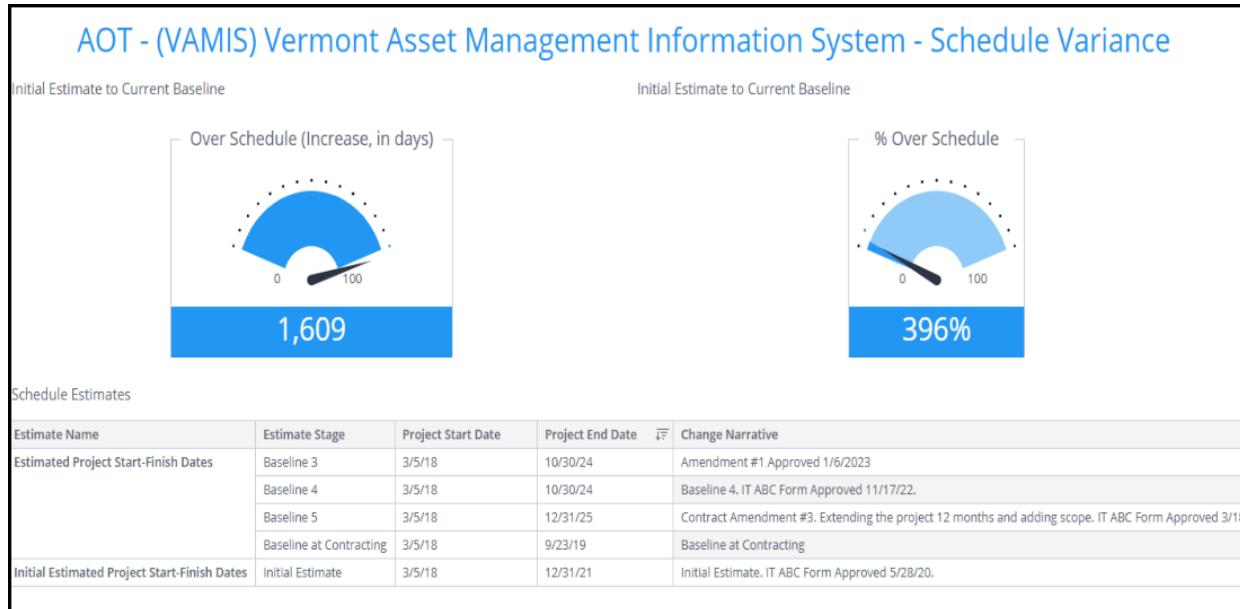
### Schedule Summary

The project is currently in its 48th sprint and remains on schedule to conclude in December 2025. Each asset development sprint lasts four weeks.

### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$12,774,956.21                              | \$1,2733,695.34                                | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$3,480,332.20                               | \$5,534,369.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$16,255,288.41                              | \$18,268,064.34                                | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |   |                                  |         |
|-----------------------------------|---|-------------------------------------|---|----------------------------------|---------|
| Project Name                      | AOT - DMV - Core Systems Replacement                        |                                     |   |                                  |         |
| Agency/Department                 | Agency of Transportation (AOT) Department of Motor Vehicles |                                     | Current Project Phase   |                                  | Closing |
| Original Project Start Date       | 7/1/2021  | Original Project Estimated End Date | 12/12/2025  | Number of Change Orders Approved | 0       |
| Actual Start Date                 | 6/13/2022   | Current Estimated End Date          | 12/12/2025  |                                  |         |
| Project                           | Status  |                                     | Update  |                                  |         |
| Scope                             | ON TRACK  |                                     | The baseline scope for the DMV Core Modernization project includes two releases: Vehicle Services (VS) and Driver Services (DS). VS was completed and went live on 11/13/23, including: vehicle titling, registration, and renewals; impound records; dealer licensing & regulation; plate, decal, temporary and single-use permit inventory management and Point of Sale. The second release is Driver Services. It kicked off 6/15/2024 and is scheduled to be implemented 11/12/2024. Scope will include: issue & maintain driver's licenses & other identification; support fraud detection, investigation, hearings, scheduling, and management, financial responsibility and the admin & reporting of driver restrictions, convictions, and other info related to driver improvement & control. |                                  |         |
| Schedule                          | ON TRACK  |                                     | The project has two roll outs of 18 months each, one for Vehicle Services (VS) and one for Driver Services (DS) . The VS release successfully completed 11/13/2023. The DS schedule is in progress and on track for completion on 11/12/2025.   |                                  |         |
| Budget                            | ON TRACK  |                                     | In March 2024 the budget for DMV Core Modernization project (Vehicle Services & Driver Services) was rebaselined to align vendor costs with Lifecycle Analysis Detail. The costs were increased from \$85,180,984.00 to \$97,280,480 to account for Appointment Scheduling, increase in equipment costs. Note: The Lifecycle Costs do not include DMV Staff costs. With Actual costs to date equaling \$51,581,652.00 paid in Vision as of Oct 31, 2025, including DMV Staff costs. The budget is on track and continues to be closely monitored. Release 1: Vehicle Services - The   |                                  |         |

|  |  |   |
|--|--|---|
|  |  | Legislature approved \$24,500,000 in the Spring 2021 session. Release 2: Driver Services - the Legislature approved \$20,250,000 in FY23 budget. The Legislature approved funding, in conjunction with the DMV Budget, should be sufficient to implement the FAST DSVS software within the established project begin and end dates. |
|--|--|---|

|         |          |  |
|---------|----------|--|
| Overall | ON TRACK |  |
|---------|----------|--|

#### Scope Summary

The AOT DMV Core Systems Replacement project is a significant initiative aimed at enhancing the efficiency and management of operations within the Department of Motor Vehicles (DMV) in Vermont. By replacing the existing core systems, we aim to streamline various functions and improve the overall effectiveness of DMV operations. The new solution will encompass a range of functionalities, including vehicle titling, registration, and renewals. This will enable smoother and more efficient processes for individuals and businesses seeking to title and register their vehicles. Additionally, the solution will manage impound records, ensuring accurate and up-to-date information for impounded vehicles. Dealer licensing and regulation will also be handled by the new system, providing a centralized platform for managing dealer licenses and ensuring compliance with regulations. The solution will also facilitate inventory management for plates, decals, temporary permits, and single-use permits, ensuring accurate tracking and efficient distribution. Furthermore, the solution will be responsible for issuing and maintaining driver's licenses and other identification documents. This includes supporting fraud detection and investigation, managing hearings and scheduling, and handling financial responsibility related to driver restrictions, convictions, and other driver improvement and control information. The system will provide comprehensive administration and reporting capabilities for driver-related data, enabling efficient management and accurate reporting. The AOT DMV Core Systems Replacement project represents our commitment to enhancing the efficiency and effectiveness of DMV operations in Vermont. By implementing a new solution, we aim to streamline processes, improve data accuracy, and provide better services to individuals, businesses, and law enforcement agencies. We remain dedicated to the successful implementation of the new core systems, ensuring that the DMV has the necessary tools and capabilities to manage vehicle titling, registration, dealer licensing, and driver-related functions. Through this project, we are advancing the capabilities of the DMV and supporting the overall transportation infrastructure in Vermont.

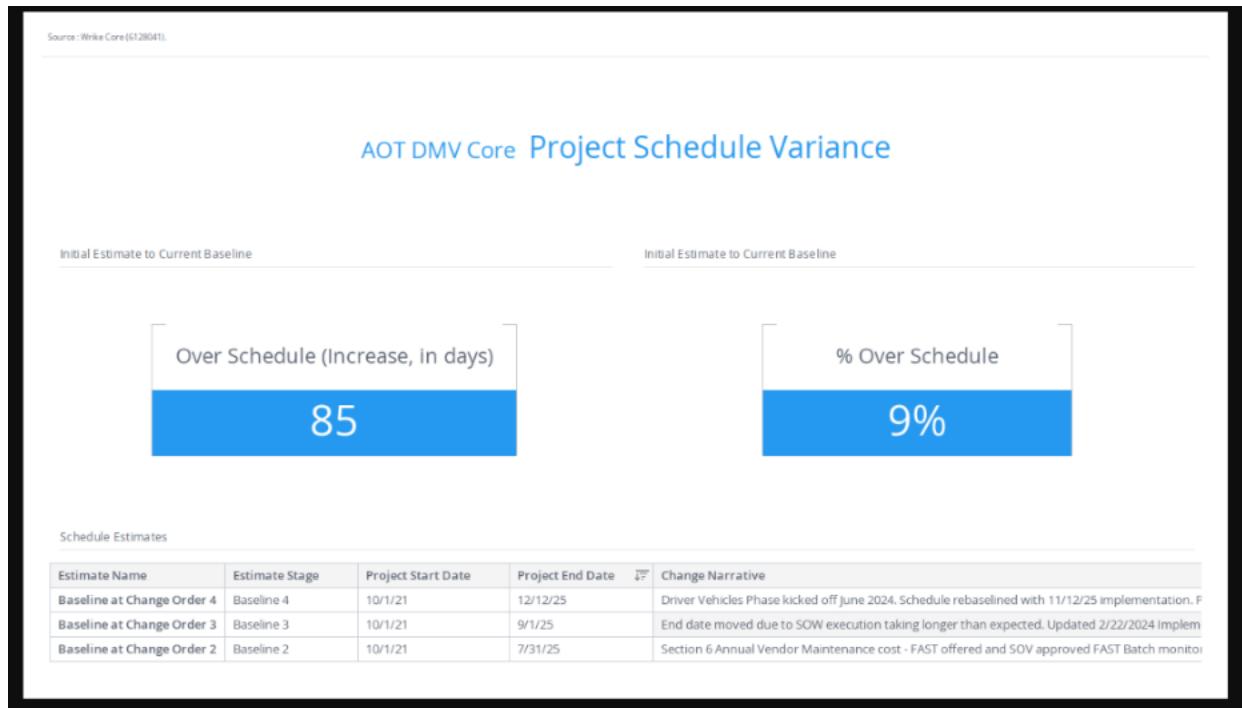
#### Schedule Summary

The total implementation project duration is 36 months. There will be two roll outs with 18 months for Vehicle Services (VS) and 18 months for Driver Services (DS). VS was successfully implemented on 11/13/2023. For DS, the schedule is 6/5/2024 - 11/12/2025.

| Budget Summary                                      |   |   |
|---|---|---|
| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>  | <b>Budget Status – On Track, Over or Under Budget</b> |
| \$50,724,790.00                                     | \$51,210,563.00                                     | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$41,567,185.00                                     | \$46,069,917.00                                     | ON TRACK  |

| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
| \$9,2291,975.00                           | \$97,280,480.00                                | ON TRACK                             |
| <b>Solution Lifecycle Years</b>           | 5  |                                      |

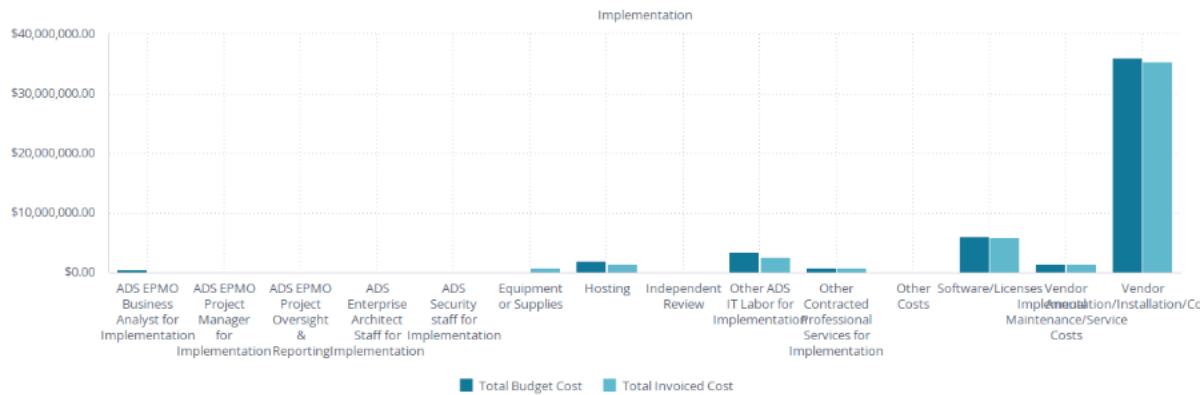
### Schedule Variance and Budget to Actuals Charts



## DMV Core Modernization Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |  |  |   |           |  |  |  |  |  |
|---|---|--|--|---|-----------|--|--|--|--|--|
| <b>Project Name</b>   | AOT DMV ePermitting 2.0                                     |  |  |   |           |  |  |  |  |  |
| <b>Agency/Department</b>  | Agency of Transportation (AOT) Department of Motor Vehicles |  | <b>Current Project Phase</b>   |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>  | 12/20/2022  | <b>Original Project Estimated End Date</b> | 1/30/2026  | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>  | 12/9/2024   | <b>Current Estimated End Date</b>          | 6/27/2026  |   |           |  |  |  |  |  |
| Project   | <b>Status</b>   |  | <b>Update</b>  |   |           |  |  |  |  |  |
| <b>Scope</b>  | <b>ON TRACK</b>   |  | Scope was baselined with the execution of the implementation contract. No scope concerns have been identified during execution.  |   |           |  |  |  |  |  |
| <b>Schedule</b>   | <b>ON TRACK</b>   |  | The contract was fully executed on 12/09/24 with project kickoff. The project is expected to take 13 months and is on track for full solution launch in January 2026.  |   |           |  |  |  |  |  |
| <b>Budget</b>   | <b>ON TRACK</b>   |  | Initial estimated costs were \$2,456,923.00 but revised to \$2,379,468 at contract execution. Actual costs to date are \$576,888.56. The project has received a \$2M Federal Motor Carrier Safety Administration (FMCSA) Grant for implementation costs. |   |           |  |  |  |  |  |
| <b>Overall</b>  | <b>ON TRACK</b>   |  |  |   |           |  |  |  |  |  |
| <b>Scope Summary</b>  |   |  |  |   |           |  |  |  |  |  |
| The AOT DMV ePermitting 2.0 project is a significant initiative aimed at streamlining the process for obtaining oversized/overweight commercial vehicle permits in Vermont. By implementing an electronic permitting system, we aim to provide the trucking industry with a convenient and efficient way to apply for permits and ensure compliance with regulations.                 |   |  |  |   |           |  |  |  |  |  |
| The project will introduce a user-friendly online platform that allows trucking companies to apply for permits electronically. This platform will be accessible 24/7, providing flexibility and convenience for the industry. Trucking companies will be able to submit permit applications at their convenience, eliminating the need for in-person visits or paper-based processes. |   |  |  |   |           |  |  |  |  |  |
| The ePermitting system will also facilitate online payment for permits, if required. This will streamline the payment process, reducing administrative burdens and ensuring timely processing of permits. By enabling electronic payments, we aim to improve efficiency and provide a seamless experience for trucking companies.   |   |  |  |   |           |  |  |  |  |  |
| The implementation of ePermitting 2.0 will ensure that trucking companies can legally operate on state and municipal highways and roads. By obtaining the necessary permits electronically, they will have the documentation required to comply with regulations and safely transport oversized or overweight loads.  |   |  |  |   |           |  |  |  |  |  |

The AOT DMV ePermitting 2.0 project represents our commitment to leveraging technology to enhance the permitting process for the trucking industry. By providing a user-friendly online platform, we aim to streamline operations, reduce administrative burdens, and improve compliance with regulations.

We remain dedicated to the successful implementation of ePermitting 2.0, ensuring that the trucking industry has a convenient and efficient way to obtain oversized/overweight commercial vehicle permits. Through this project, we are supporting the industry's operations while ensuring the safety and integrity of Vermont's highways and roads.

#### Schedule Summary

The RFP was posted Oct 2023, and a preferred vendor was selected April 2024. The contract start date was 12/09/24, with 13 months planned for implementation. The project is on track for full solution launch in January 2026.

#### Budget Summary

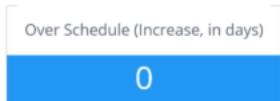
| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$1,653,868.00                               | \$1,653,868.00                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$725,600.00                                 | \$725,600.00                                   | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$2,379,468.00                               | \$2,379,468.00                                 | ON TRACK                                       |
| <b>Solution Lifecycle Years</b>              | 5  |  |

## Schedule Variance and Budget to Actuals Charts

### AOT DMV ePermitting Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



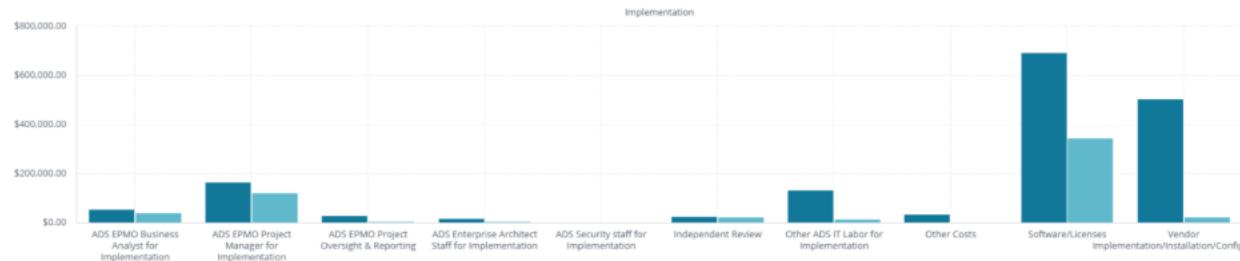
#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative         |
|--|-------------------------|--------------------|------------------|--------------------------|
| Estimate at Contracting                      | Baseline at Contracting | 12/9/24            | 2/27/26          | Estimate at contracting. |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 2/1/23             | 6/27/25          | Initial estimate.        |

### AOT DMV ePermitting Budget Summary

Actual Project Costs through October 2025

#### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |         |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|---------|
| Project Name                      | AOT - HD - Construction Management System (CMS) |                                     |  |                                  |         |
| Agency/Department                 | Agency of Transportation (AOT)                  |                                     | Current Project Phase  |                                  | Closing |
| Original Project Start Date       | 6/27/2019                                       | Original Project Estimated End Date | 1/30/2026  | Number of Change Orders Approved | 11      |
| Actual Start Date                 | 7/9/2018  | Current Estimated End Date          | 12/1/2026  |                                  |         |
| Project                           | Status  |                                     | Update   |                                  |         |
| Scope                             | MANAGEABLE RISKS                                |                                     | Scope is being controlled within bounds of contract. Out-of-scope items identified during elicitation are managed using prioritization and minimum-viable-product model, with highest priority items approved as enhancements. Twelve Change Orders have been executed to date to refactor schedule and allow for needed functionality not included the base contract.   |                                  |         |
| Schedule                          | ON TRACK  |                                     | The project is currently entering the closing phase with all modules completed. The final module go-live occurred in September 2025, a four month delay from original estimates.   |                                  |         |
| Budget                            | MANAGEABLE RISKS                                |                                     | In 2017, the baseline budget for the CMS replacement project was approved, The approved budget was for \$3,679,200 in implementation costs and a total 20-year lifecycle cost of \$17,178,576. In 2020 the budget was revised to account for changes identified outside contract scope deemed necessary to allow for current systems to be replaced. The 2020 implementation budget was increased to \$9,325,236.22 with total 5-year lifecycle cost of \$10,834,754.48. This budget reflected the first six change requests executed against the project. The contract is currently being extended to 2030, and incorporating all implementation change orders processed to date. These changes will result in an expected implementation cost of \$6,262,477.28 and a total lifecycle cost of \$10,947,946.32. To date, the state has incurred \$5,492,920.45 in implementation costs and \$7,163,277.03 in total lifecycle costs. |                                  |         |
| Overall                           | MANAGEABLE RISKS                                |                                     |  |                                  |         |
| Scope Summary                     |   |                                     |  |                                  |         |

The baseline scope includes the implementation of a Software as a Service (SaaS) solution which enables the end-to-end source-to-pay procurement functionality for the State of Vermont. There are multiple enhancements that require change orders that add scope to the original scope of work. The Executive Steering Committee (ESC) and the Project Management Team have evaluated all needed changes to the solution and approved change orders to authorize funding for these changes to be made. A contract amendment is currently being negotiated to incorporate all approved change orders and extend the license and support term to 2030.

#### Schedule Summary

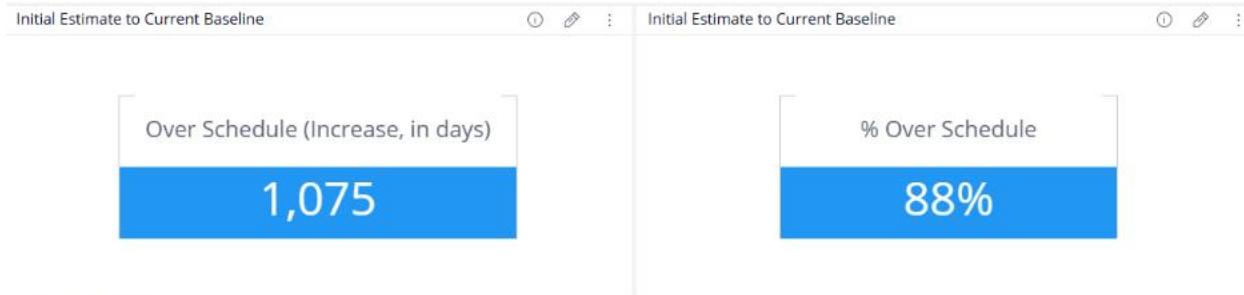
The baseline schedule for CMS was established in 2018 on contract execution and had an expected completion of 2021. The schedule was revised in 2020 to extend the completion date to 2025 based on estimated changes needed to accomplish features not covered in the base contract. The first phase (Contracts and Estimation) had a go-live date of March 2021. The second phase (Construction and Materials) had a go-live date of Feb 22, 2024. The last phase (Civil Rights, Mobile and Enhancements) had a go-live date in September of 2025. The project is now entering the closing phase with implementation activities expected to complete by the end of November.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$9,505,220.14                               | \$6,262,477.99                                 | OVER BUDGET                                    |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,511,090.00                               | \$4,685,468.33                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$11,016,310.14                              | \$10,947,946.32                                | OVER BUDGET                                    |
| Solution Lifecycle Years                     | 8  |  |

## Schedule Variance and Budget to Actuals Charts

### AOT Construction Management System Project Schedule Variance

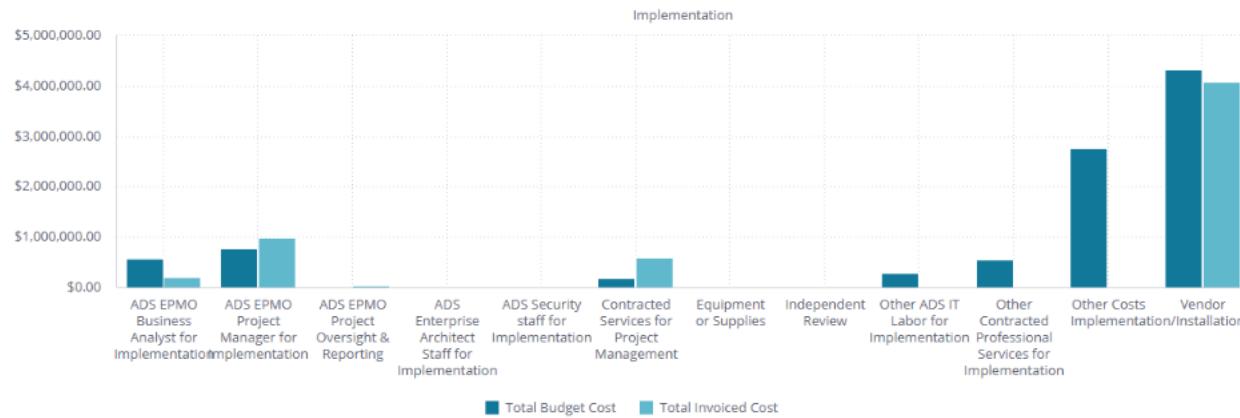


| Schedule Estimates                                  |                         |                    |                  |   |
|---|-------------------------|--------------------|------------------|---|
| Estimate Name                                       | Estimate ...            | Project Start Date | Project End Date | Change Narrative  |
| Initial Estimated Project Start-Finish Dates        | Baseline at Contracting | 1/12/17            | 9/8/21           | Contracted implementation start-finish dates  |
| Initial Estimated Project Start-Finish Dates IT ABC | Planning Estimate       | 1/12/17            | 9/8/21           | Estimated start-finish dates based on proposal  |
| CR 01 Schedule rebaseline                           | Baseline 2              | 1/12/17            | 9/6/23           | Change request 1 (signed May 1, 2019) extended the schedule. The business and vendor recognized that the contract estimate did not account for the amount of time needed to elicit detailed requirements for development of customized modules for the electronic bidding system (EBS). |
| CR 002 Schedule rebaseline                          | Baseline 3              | 4/2/20             | 6/25/24          | Change Request 2 (Signed July 11 2019) identified no-cost enhancements to the system and extended the estimated completion date to June 25, 2024  |
| CR011 Schedule Rebaseline                           | Baseline 4              | 1/12/17            | 6/25/25          | Change Request 11 (signed July 6, 2022) identified a need for additional enhancements for the materials and Construction subsystem that were required to replace functionality in legacy systems and extended the project implementation completion date to June 25, 2025               |
| Contract Amendment / CR012 Schedule Rebaseline      | Baseline 5              | 1/12/17            | 11/26/25         | Change request 12 was an extension of time request to complete mobile and civil rights implementation to November 26, 2025 and the overall contract to 2030.  |
| Contract Amendment 1 Schedule Rebaseline            | Baseline 6              | 1/12/17            | 11/26/25         | Contract amendment 1 authorized an overall contract extension to Jan 30, 2025 with no change to the overall implementation due date.  |

## • AOT- Construction Management System Replacement Budget Summary

Actual Project Costs through September 2025

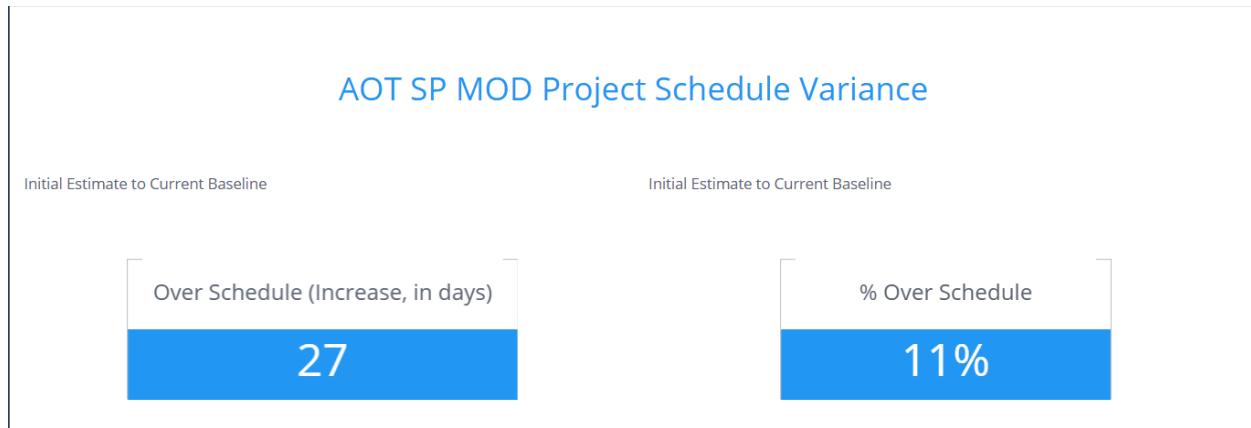
### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT   |                                |  |  |                                  |         |  |  |  |  |  |
|---|--------------------------------|--|--|----------------------------------|---------|--|--|--|--|--|
| Project Name  | AOT SharePoint Modernization   |  |  |                                  |         |  |  |  |  |  |
| Agency/Department   | Agency of Transportation (AOT) |  | Current Project Phase  |                                  | Closing |  |  |  |  |  |
| Original Project Start Date   | 4/23/2024                      | Original Project Estimated End Date          | 7/31/2025  | Number of Change Orders Approved | 2       |  |  |  |  |  |
| Actual Start Date   | 9/13/2024                      | Current Estimated End Date                   | 7/31/2025  |                                  |         |  |  |  |  |  |
| Project   | Status                         |  | Update   |                                  |         |  |  |  |  |  |
| Scope   | ON TRACK                       |  | The project was closed no major changes or amendments required.  |                                  |         |  |  |  |  |  |
| Schedule  | ON TRACK                       |  | The AOT SharePoint Modernization Project went live on the scheduled date of 5/1/25, and the project was closed on 6/24/25. |                                  |         |  |  |  |  |  |
| Budget  | ON TRACK                       |  | The project was closed with an actual project cost of \$200,000, below the budgeted cost of \$214,960.                     |                                  |         |  |  |  |  |  |
| Overall   | ON TRACK                       |  |  |                                  |         |  |  |  |  |  |
| Scope Summary   |                                |  |  |                                  |         |  |  |  |  |  |
| The SharePoint Migration/Update project for the Agency of Transportation (AOT) represents a strategic initiative to overhaul and modernize the Agency's SharePoint data infrastructure. This project encompasses the design and implementation of a new intranet architecture and associated administrative processes, tailored to meet the evolving needs of AOT's diverse departments. With a focus on usability, compliance, employee education, and efficient document management, this project aims to transform the way AOT manages and interacts with its critical data. |                                |  |  |                                  |         |  |  |  |  |  |
| Schedule Summary  |                                |  |  |                                  |         |  |  |  |  |  |
| The AOT SharePoint Modernization Project went live on 5/1/25 and all support activities for the project have completed. The project is now CLOSED.  |                                |  |  |                                  |         |  |  |  |  |  |
| Budget Summary  |                                |  |  |                                  |         |  |  |  |  |  |
| Total Original Estimated Implementation Cost  |                                | Total Current Estimated Implementation Cost  | Budget Status – On Track, Over or Under Budget   |                                  |         |  |  |  |  |  |
| \$214,960.00  |                                | \$214,960.00                                 | ON TRACK   |                                  |         |  |  |  |  |  |
| Total Original Estimated Operating Cost   |                                | Total Current Estimated State Operating Cost | Budget Status – Over or Under Budget   |                                  |         |  |  |  |  |  |
|   |                                | 0  | ON TRACK   |                                  |         |  |  |  |  |  |

| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
|   | \$214,960.00                                   | ON TRACK                             |
| <b>Solution Lifecycle Years</b>           | 5  |                                      |

#### Schedule Variance and Budget to Actuals Charts



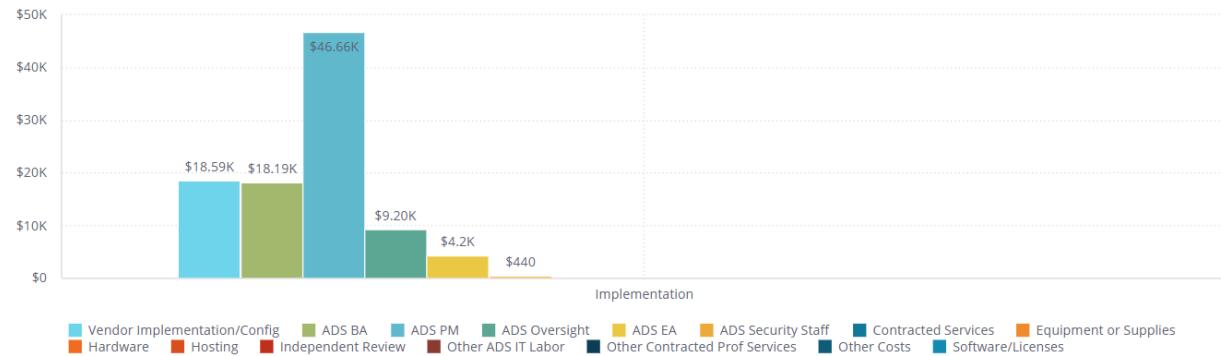
## AOT SharePoint Modernization Project Budget Details

Actual Project Costs through December 2025

### Budgeted vs Actual Invoiced Implementation Costs

| Cost Category* | Cost Type*                                       | Total Budget Cost | Total Invoiced Cost | Budget Remaining | % Budget Remaining |
|----------------|--|-------------------|---------------------|------------------|--------------------|
| Implementation | ADS EPMO Project Manager for Implementation      | \$50,000.00       | \$53,020.00         | \$-3,020.00      | -6.04%             |
|                | ADS EPMO Project Oversight & Reporting           |                   | \$836.00            | \$-836.00        |                    |
|                | Other ADS IT Labor for Implementation            | \$20,000.00       |                     | \$20,000.00      | 100.00%            |
|                | Vendor Implementation/Installation/Configuration | \$144,960.00      | \$144,960.00        | \$0.00           | 0.00%              |
| Grand Total    |  | \$214,960.00      | \$198,816.00        | \$16,144.00      | 7.51%              |

### Actual Implementation Costs by Cost Type



| IT ACTIVITY ANNUAL SUMMARY REPORT   |  |  |  |   |         |  |  |  |  |  |
|---|--|--|--|---|---------|--|--|--|--|--|
| <b>Project Name</b>   | AOT Wrike Implementation                           |  |  |   |         |  |  |  |  |  |
| <b>Agency/Department</b>  | Agency of Transportation (AOT)                     |  | <b>Current Project Phase</b>   |   | Closing |  |  |  |  |  |
| <b>Original Project Start Date</b>  | 12/2/2024  | <b>Original Project Estimated End Date</b> | 5/30/2025  | <b>Number of Change Orders Approved</b> | 0       |  |  |  |  |  |
| <b>Actual Start Date</b>  | 10/29/2024   | <b>Current Estimated End Date</b>          | 5/30/2025  |   |         |  |  |  |  |  |
| <b>Project</b>  | <b>Status</b>                                      |  | <b>Update</b>  |   |         |  |  |  |  |  |
| <b>Scope</b>  | ON TRACK   |  | The project successfully closed with no changes to scope as defined in the IT ABC and Charter.   |   |         |  |  |  |  |  |
| <b>Schedule</b>   | ON TRACK   |  | The project closed on schedule on the projected May 30, 2025 completion date.  |   |         |  |  |  |  |  |
| <b>Budget</b>   | ON TRACK   |  | The project is budgeted to cost \$866,880 over its 5-year lifecycle. \$215,685 of the budgeted \$215,685 in implementation costs was expended to complete the project. |   |         |  |  |  |  |  |
| <b>Overall</b>  | ON TRACK   |  |  |   |         |  |  |  |  |  |
| <b>Scope Summary</b>  |  |  |  |   |         |  |  |  |  |  |
| The objective of this project is to replace the current legacy construction project management platform, Artemis, used by the Agency of Transportation (AOT) Highway Division Project Delivery Bureau with a modern cloud-based platform. Artemis is a decades old, legacy on-prem solution with high licensing costs. Over the past two years, multiple unsuccessful attempts were made to solicit a solution to replace Artemis. When it was announced that the Agency of Digital Services (ADS) Enterprise Project Management Office (EPMO) implemented a solution (Wrike) to replace its Portfolio/Project Management solution, ADS assigned to AOT introduced Wrike to AOT to determine if it could meet the Agency's needs and possibly replace Artemis. During an evaluation by AOT Project Delivery Bureau Leadership and ADS it was determined that Wrike would meet AOT's needs and the project was officially launched. The scope of this project is to identify all Statement of Work (SOW) activities to procure Wrike licenses and system implementation professional services for AOT and ensure the successful implementation of the solution for all current users of Artemis. |  |  |  |   |         |  |  |  |  |  |
| <b>Schedule Summary</b>   |  |  |  |   |         |  |  |  |  |  |
| The project started on June 28, 2024 and complete on schedule on May 30, 2025. No changes occurred to the baseline overall schedule since project inception.  |  |  |  |   |         |  |  |  |  |  |
| <b>Budget Summary</b>   |  |  |  |   |         |  |  |  |  |  |
| <b>Total Original Estimated Implementation Cost</b>   | <b>Total Current Estimated Implementation Cost</b> |  | <b>Budget Status – On Track, Over or Under Budget</b>  |   |         |  |  |  |  |  |
| \$296,480.00  | \$296,480.00                                       |  | ON TRACK   |   |         |  |  |  |  |  |

| Total Original Estimated Operating Cost   | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
| \$570,400.00                              | \$570,400.00                                   | ON TRACK                             |
| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
| \$866,880.00                              | \$866,880.00                                   | ON TRACK                             |
| Solution Lifecycle Years                  | 5  |                                      |

#### Schedule Variance and Budget to Actuals Charts

##### AOT Wrike Implementation Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

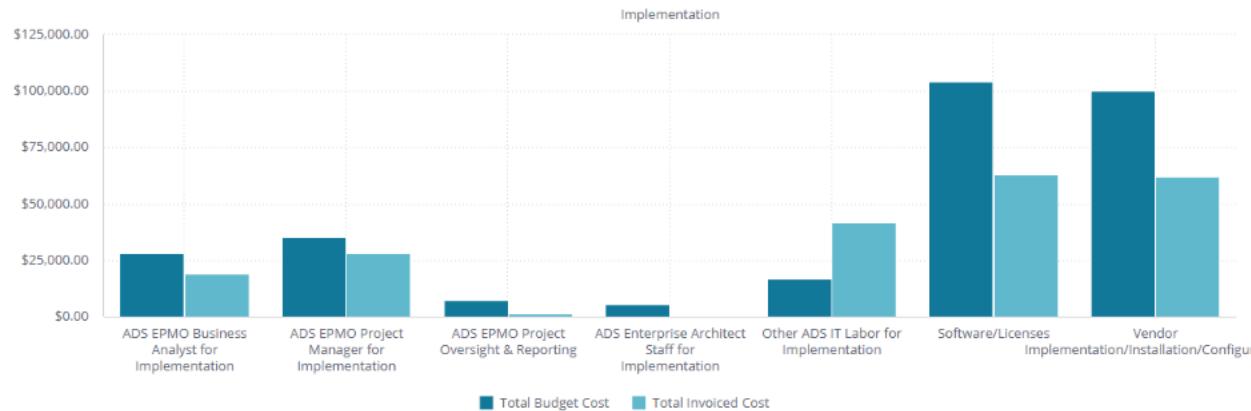




## AOT- Wrike Implementation Budget Summary

Actual Project Costs through September 2025

### Budgeted vs Actual Invoiced Implementation Costs





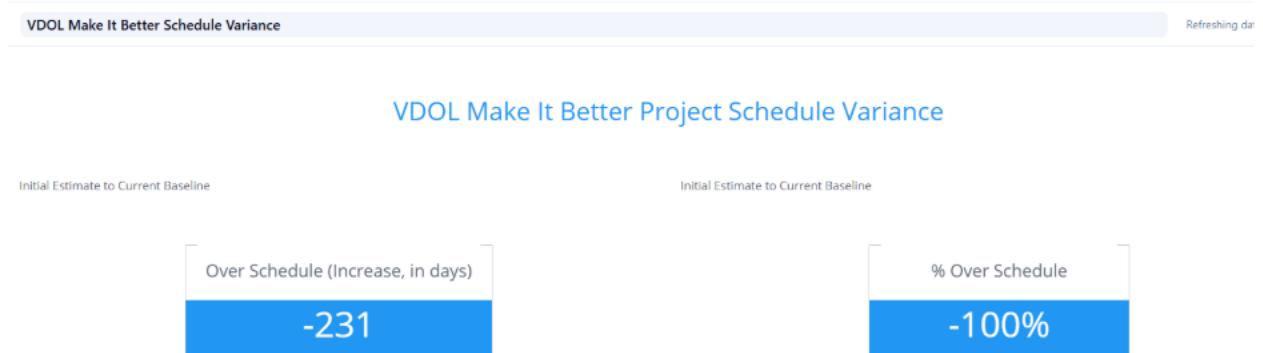
# Department of Labor (DOL)

| IT ACTIVITY ANNUAL SUMMARY REPORT  |                           |                                     |  |                                  |         |  |  |  |  |  |
|--|---------------------------|-------------------------------------|--|----------------------------------|---------|--|--|--|--|--|
| Project Name   | VDOL - Make IT Better     |                                     |  |                                  |         |  |  |  |  |  |
| Agency/Department  | Other Department of Labor |                                     | Current Project Phase  |                                  | Closing |  |  |  |  |  |
| Original Project Start Date  | 12/7/2023                 | Original Project Estimated End Date | 3/25/2024  | Number of Change Orders Approved | 0       |  |  |  |  |  |
| Actual Start Date  | 2/15/2024                 | Current Estimated End Date          | 3/25/2024  |                                  |         |  |  |  |  |  |
| Project  | Status                    |                                     | Update   |                                  |         |  |  |  |  |  |
| Scope  | ON TRACK                  |                                     | This project was implemented within the originally identified scope. However, there were times in which additional scope was under consideration in order to better support the outcome of the initiative and the needs of our business partners. These items, outside of scope, were identified and documented for future consideration.  |                                  |         |  |  |  |  |  |
| Schedule   | MANAGEABLE RISKS          |                                     | This project was not completed during it's originally anticipated timeline, due to various reasons, such as resource availability, under-estimating the level of work effort required and high level of unknowns at the start of the project.  |                                  |         |  |  |  |  |  |
| Budget   | MANAGEABLE RISKS          |                                     | This project did not have an established ITABC form. However, the IT Service request was documented at \$930,904.72. However, due to the need to extend the project through February 2025, in order to complete the effort, the actual costs billed through the most recent billing cycle of January 2025, were \$1,159,231.20. Please note that this total is not reflective of any hours billed from 2/19/2025 – to present, as invoices for this period have not yet been released. |                                  |         |  |  |  |  |  |
| Overall  | MANAGEABLE RISKS          |                                     |  |                                  |         |  |  |  |  |  |
| Scope Summary  |                           |                                     |  |                                  |         |  |  |  |  |  |
| The scope of this project was well defined but experienced intermittent instances of scope creep. This impacted the project schedule. Mitigation discussions resolved scope creep and the project work returned to its intended scope. |                           |                                     |  |                                  |         |  |  |  |  |  |
| Schedule Summary   |                           |                                     |  |                                  |         |  |  |  |  |  |

This project was not completed by its originally anticipated deadline.

| Budget Summary                                      |   |   |
|---|---|---|
| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
| \$509,965.43  | \$952,140.00  | OVER BUDGET   |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
|   | 0   | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
|   | \$952,140.00  | OVER BUDGET   |
| <b>Solution Lifecycle Years</b>                     | <b>5</b>  |   |

### Schedule Variance and Budget to Actuals Charts



#### Schedule Estimates

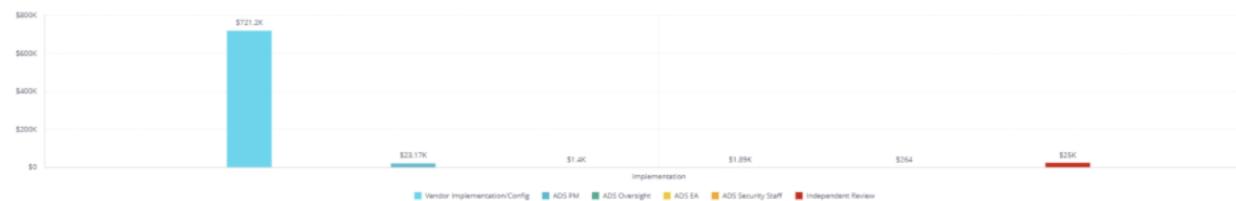
| Estimate Name   | Estimate Stage       | Project Start Date | Project End Date | Change Narrative   |
|---|----------------------|--------------------|------------------|--|
| 00. Initial Estimated Project Start-Finish Dates (Service Request ) | Initial Estimate     | 12/1/23            | 10/31/24         | The Originally Approved Service Request form was executed on 6/25/24.  |
| 01. Project Start-Finish Dates (Project Close Out )                 | Baseline at Closeout | 12/1/23            | 2/27/25          | The actual project end dates, as per project close out. The schedule was extended due to complex discovery and migration planning. An updated service request was not completed to update estimated dates. |

**VDOL Make It Better Budget Details**  
Actual Project Costs through September 2025

Budgeted vs Actual Invoiced Implementation Costs

| Cost Category*     | Cost Type*  | Total Budget Cost     | Total Invoiced Cost   | Budget Remaining      | % Budget Remaining |
|--------------------|---|-----------------------|-----------------------|-----------------------|--------------------|
| Implementation     | ADS Enterprise Architect Staff for Implementation         | \$2,153,049.14        | \$75,030.00           | \$2,078,029.14        | 96.52%             |
|                    | ADS EPVO Business Analyst for Implementation              | \$175,333.72          | \$72,116.00           | \$103,217.72          | 58.87%             |
|                    | ADS EPVO Project Manager for Implementation               | \$143,836.00          | \$61,910.00           | \$81,926.00           | 56.84%             |
|                    | ADS EPVO Project Oversight & Reporting                    |                       |                       |                       |                    |
|                    | ADS Security staff for Implementation                     | \$114,842.86          | \$4,752.00            | \$110,090.86          | 95.88%             |
|                    | Other ADS IT Labor for Implementation                     | \$1,237,080.00        | \$992,634.20          | \$244,445.80          | 19.76%             |
|                    | Other Contracted Professional Services for Implementation | \$120,000.00          | \$120,000.00          |                       | 100.00%            |
| <b>Grand Total</b> |   | <b>\$3,944,141.72</b> | <b>\$1,214,108.20</b> | <b>\$2,730,033.52</b> | <b>69.22%</b>      |

Actual Implementation Costs by Cost Type

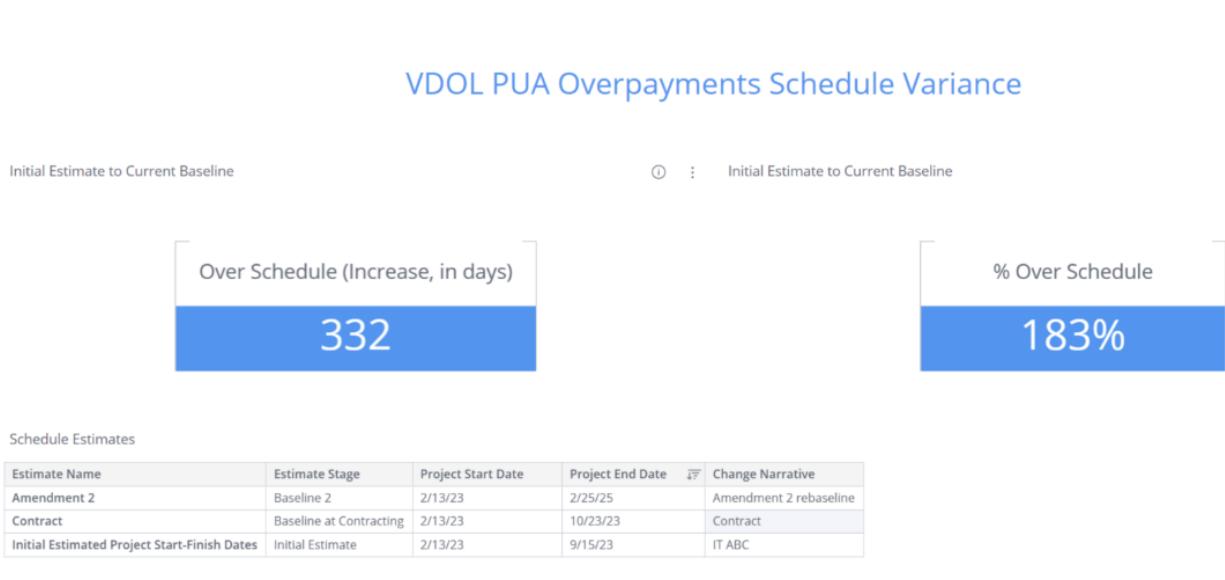


| IT ACTIVITY ANNUAL SUMMARY REPORT   |   |                                     |   |                                  |           |  |  |  |  |  |
|---|---|-------------------------------------|---|----------------------------------|-----------|--|--|--|--|--|
| Project Name  | VDOL - PUA Overpayments and Collections |                                     |   |                                  |           |  |  |  |  |  |
| Agency/Department   | Other Department of Labor               |                                     | Current Project Phase   |                                  | Execution |  |  |  |  |  |
| Original Project Start Date   | 2/15/2022                               | Original Project Estimated End Date | 3/31/2025   | Number of Change Orders Approved | 2         |  |  |  |  |  |
| Actual Start Date   | 6/26/2023                               | Current Estimated End Date          | 3/31/2025   |                                  |           |  |  |  |  |  |
| Project   | Status                                  |                                     | Update  |                                  |           |  |  |  |  |  |
| Scope   | ON TRACK                                |                                     | The project scope has been trimmed significantly. Now that the statute of limitations has been reached for collection of overpayments and USDOL has approved VDOL applying a state statute to PUA paid claims, VDOL will not seek to collect from overpaid claimants. The PUA system will be utilized to notify claimants of overpayment status and that no action will be taken to recoup the funds. It will also be utilized to produce required federal reports, and pursue fraudulent claims. |                                  |           |  |  |  |  |  |
| Schedule  | ON TRACK                                |                                     | The project met the rebaselined schedule for go-live. The project remains open for EPMO support of post go-live activities. Some functionality was completed during the warranty period, such as finalized federal report functions and updated e-mail templates. More functionality is needed for federal reporting before project closure.  |                                  |           |  |  |  |  |  |
| Budget  | ON TRACK                                |                                     | Current spend reflects \$1,142,193 of the budgeted \$1,188,743. The project is over the original estimate but in line with rebaselined budget.  |                                  |           |  |  |  |  |  |
| Overall   | ON TRACK                                |                                     |   |                                  |           |  |  |  |  |  |
| Scope Summary   |   |                                     |   |                                  |           |  |  |  |  |  |
| The project originally aimed to add functionality to the current Salesforce Pandemic Unemployment Assistance application (PUA) to determine and calculate PUA overpayments, communicate to claimants, and collect monies to reduce/eliminate overpayment balances. The project sought to satisfy requirements of the United States and Vermont Departments of Labor (USDOL and VDOL) to collect and/or recover monies that have been overpaid to PUA claimants. The scope was trimmed to not include collection/recovery of monies in line with USDOL guidance. Federal reporting is still required, and the functionality seeks to fulfill this reporting need and pursue fraudulent claims. |   |                                     |   |                                  |           |  |  |  |  |  |
| Schedule Summary  |   |                                     |   |                                  |           |  |  |  |  |  |

Originally the project was scheduled to be completed in September of 2023. It was rebaselined to complete in October 2024, with a warranty period until January 2025. Upon completion of warranty, the project has remained open to allow for EPMO support during a post-implementation phase supporting VDOL's federal reporting needs. The project is expected to close in 2025 at the completion of these post-implementation activities.

| Budget Summary                                      |   |   |
|---|---|---|
| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
| \$1,168,743.00                                      | \$1,168,743.00  | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
| \$20,000.00   | \$20,000.00   | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$1,188,743.00                                      | \$1,188,743.00  | ON TRACK  |
| <b>Solution Lifecycle Years</b>                     | 5   |   |

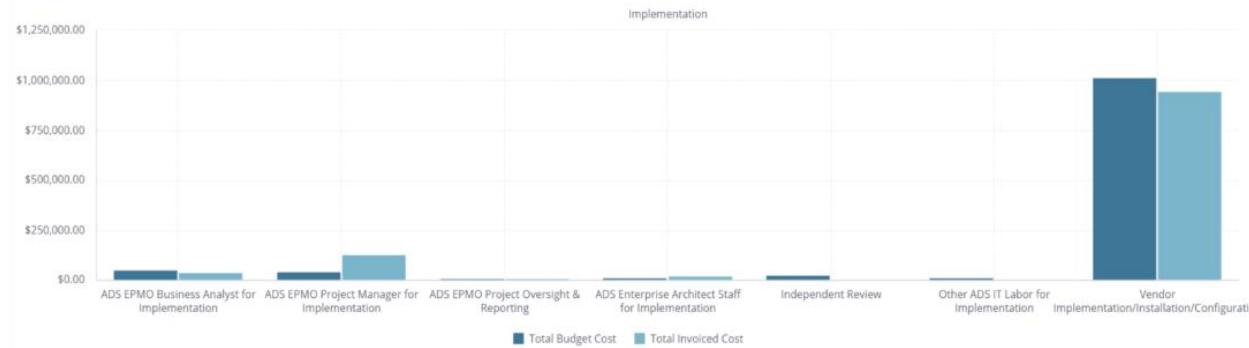
#### Schedule Variance and Budget to Actuals Charts



## VDOL PUA Annual Report Budget Summary

Actual Project Costs through October 2025

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |   |                                     |   |                                  |           |  |  |  |  |  |
|--|---|-------------------------------------|---|----------------------------------|-----------|--|--|--|--|--|
| Project Name   | VDOL - Unemployment Insurance Modernization |                                     |   |                                  |           |  |  |  |  |  |
| Agency/Department  | Other Department of Labor                   |                                     | Current Project Phase   |                                  | Execution |  |  |  |  |  |
| Original Project Start Date  | 7/1/2021                                    | Original Project Estimated End Date | 8/15/2026   | Number of Change Orders Approved | 1         |  |  |  |  |  |
| Actual Start Date  | 9/17/2024                                   | Current Estimated End Date          | 8/15/2026   |                                  |           |  |  |  |  |  |
| Project  | Status                                      |                                     | Update  |                                  |           |  |  |  |  |  |
| Scope  | ON TRACK                                    |                                     | The project is the complete replacement of the existing Unemployment Insurance system including the front end of the claimant portal, employer portal, employer registration, and fraud reporting/case management. Scope has not been modified outside of agreements to push some items to post go-live, mutually agreed upon by VDOL and FAST. |                                  |           |  |  |  |  |  |
| Schedule   | ON TRACK                                    |                                     | The project is on track for go-live in May 2026. The team is working according to the revised schedule as that has been documented in a change request.   |                                  |           |  |  |  |  |  |
| Budget   | ON TRACK                                    |                                     | An IT ABC update was recently completed in September 2025, with a total cost of \$30,697,644.25. The project is tracking to be on budget, and \$7.5m has been spent to date.  |                                  |           |  |  |  |  |  |
| Overall  | ON TRACK                                    |                                     |   |                                  |           |  |  |  |  |  |
| Scope Summary  |   |                                     |   |                                  |           |  |  |  |  |  |
| <p>The VDOL Unemployment Insurance Modernization Project is a transformative initiative that seeks to revamp the UI program in Vermont. By replacing aging, standalone mainframe-based systems, the project aims to improve customer service, reduce costs, meet compliance requirements, and mitigate risks associated with legacy infrastructure. The project consolidates the originally planned multi-phase effort into one comprehensive project. This consolidation allows for a more streamlined and efficient implementation, ensuring that the benefits of the modernized system can be realized sooner. The existing mainframe-based systems have become increasingly costly and difficult to support, particularly when it comes to implementing federally required UI changes. The modernized system will address these challenges by providing a more flexible and adaptable platform that can efficiently handle complex UI changes and compliance requirements. By implementing a modernized system, the VDOL aims to enhance customer service by improving the efficiency and accuracy of UI processes. Claimants will experience a more streamlined and user-friendly interface, making it easier to file claims, access information, and receive timely benefits. The modernized system will also reduce costs associated with maintaining and supporting legacy infrastructure. By moving away from the aging mainframe-based systems, the VDOL can leverage modern technologies and architectures that are more cost-effective and easier to maintain. Meeting federal and state compliance requirements is a critical aspect of the project. The modernized system will ensure that all necessary regulations and guidelines are met, reducing the risk of non-compliance and associated penalties. Furthermore, the project will mitigate risks caused by outages of legacy infrastructure. By transitioning to a modernized</p> |   |                                     |   |                                  |           |  |  |  |  |  |

system, the VDOL can improve system reliability and reduce the potential for disruptions in UI services. In conclusion, the VDOL Unemployment Insurance Modernization Project represents a significant step towards revamping the UI program in Vermont. By replacing aging, standalone mainframe-based systems with a modernized system, the project aims to enhance customer service, reduce costs, meet compliance requirements, and mitigate risks associated with legacy infrastructure. This initiative reflects the commitment of the VDOL to provide efficient and effective unemployment insurance services to the people of Vermont.

#### **Schedule Summary**

The project is in the execution phase with project kickoff held on September 17, 2024. A change request resulted in a shortened schedule when the decision to do a combined, rather than split, go-live was reached in December 2024. Go-live with the unemployment insurance system is set for May 2026.

#### **Budget Summary**

| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
|---|---|---|
| \$31,840,862.25                                     | \$30,663,324.52                                       | <b>UNDER BUDGET</b>                                   |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
|   | \$12,667,000.00                                       | <b>ON TRACK</b>                                       |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
|   | \$43,330,324.52                                       | <b>ON TRACK</b>                                       |
| <b>Solution Lifecycle Years</b>                     | <b>5</b>  |   |

## Schedule Variance and Budget to Actuals Charts

### VDOL Unemployment Insurance Modernization Schedule Variance

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

**-83**

Initial Estimate to Current Baseline

% Over Schedule

**-7%**

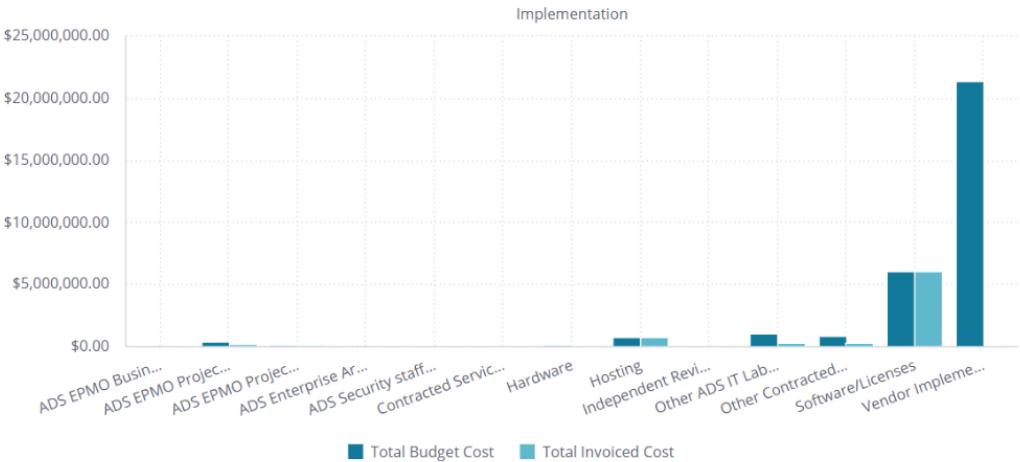
#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                     |
|--|-------------------------|--------------------|------------------|--------------------------------------|
| Contract                                     | Baseline at Contracting | 4/1/22             | 9/18/26          | Executed Contract                    |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 4/1/22             | 6/30/26          | IT ABC Estimate                      |
| Change Request/Amendment 1                   | Baseline 2              | 4/1/22             | 5/26/26          | Combined rollout CR trimmed 4 months |

### VDOL UI Annual Report Budget Summary

Actual Project Costs through October 2025

#### Budgeted vs Actual Invoiced Implementation Costs



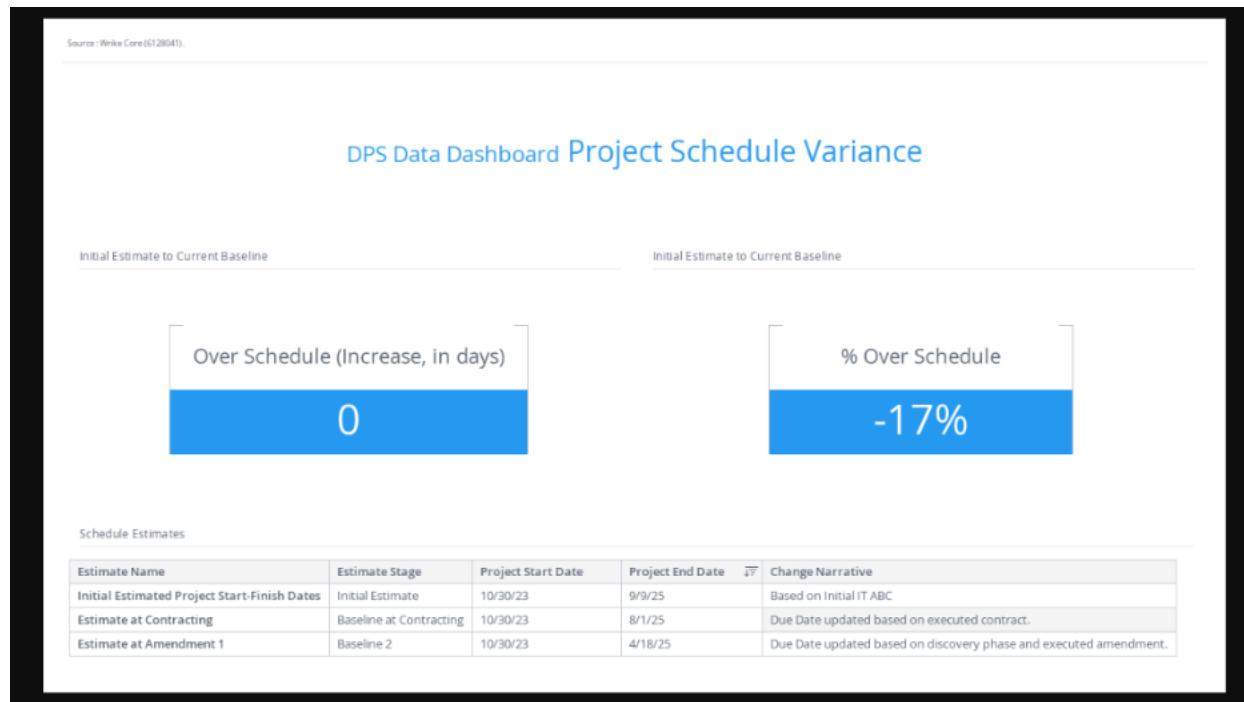


# Department of Public Safety (DPS)

| IT ACTIVITY ANNUAL SUMMARY REPORT   |                                   |  |   |                                  |           |  |  |  |  |  |
|---|-----------------------------------|--|---|----------------------------------|-----------|--|--|--|--|--|
| Project Name  | DPS - Data Dashboard              |  |   |                                  |           |  |  |  |  |  |
| Agency/Department   | Department of Public Safety (DPS) |  | Current Project Phase   |                                  | Execution |  |  |  |  |  |
| Original Project Start Date   | 10/16/2023                        | Original Project Estimated End Date          | 5/16/2025   | Number of Change Orders Approved | 0         |  |  |  |  |  |
| Actual Start Date   | 10/24/2024                        | Current Estimated End Date                   | 5/16/2025   |                                  |           |  |  |  |  |  |
| Project   | Status                            |  | Update  |                                  |           |  |  |  |  |  |
| Scope   | ON TRACK                          |  | All project scope identified in the executed SOW was implemented. The project met its original goals and requirements.            |                                  |           |  |  |  |  |  |
| Schedule  | ON TRACK                          |  | The project was successfully implemented on 4/8/25.   |                                  |           |  |  |  |  |  |
| Budget  | ON TRACK                          |  | The implementation budget established at contract execution was \$997,698.00, with actual costs at closing equaling \$969,599.00. |                                  |           |  |  |  |  |  |
| Overall   | ON TRACK                          |  |   |                                  |           |  |  |  |  |  |
| Scope Summary   |                                   |  |   |                                  |           |  |  |  |  |  |
| The Vermont Department of Public Safety is dedicated to improving law enforcement data access across the state. The main goal is to create a secure and seamless system for accessing de-identified, aggregated law enforcement data. This data is currently stored in a robust record management system. In collaboration with the Vermont Agency of Digital Services (ADS), and vendor (Slalom) we are partnering with Amazon Web Services (AWS) to construct an advanced Public Services Lakehouse environment. This partnership will revolutionize how law enforcement agencies in Vermont analyze and utilize critical data. By leveraging the power of AWS, we will establish a secure, scalable, and sustainable platform that integrates various sources of law enforcement information. This platform will empower agencies to make data-driven decisions, enhance public safety efforts, and optimize resource allocation. This aligns with Governors Strategic Initiatives in increasing transparency with Vermont Department of Public Safety (DPS) activities. |                                   |  |   |                                  |           |  |  |  |  |  |
| Schedule Summary  |                                   |  |   |                                  |           |  |  |  |  |  |
| The project was successfully implemented on 4/8/2025.   |                                   |  |   |                                  |           |  |  |  |  |  |
| Budget Summary  |                                   |  |   |                                  |           |  |  |  |  |  |
| Total Original Estimated Implementation Cost  |                                   | Total Current Estimated Implementation Cost  | Budget Status – On Track, Over or Under Budget  |                                  |           |  |  |  |  |  |
| \$997,698.00  |                                   | \$969,599.00                                 | ON TRACK  |                                  |           |  |  |  |  |  |
| Total Original Estimated Operating Cost   |                                   | Total Current Estimated State Operating Cost | Budget Status – Over or Under Budget  |                                  |           |  |  |  |  |  |

|  |   |   |
|--|---|---|
|  | 0   | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
|  | \$969,599.00  | ON TRACK                                    |
| <b>Solution Lifecycle Years</b>                  | 3   |   |

## Schedule Variance and Budget to Actuals Charts



Source : Wrike Core (6128041).

## DPS Data Dashboard Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |                                     |  |                                  |           |  |  |  |  |  |
|--|--|-------------------------------------|--|----------------------------------|-----------|--|--|--|--|--|
| Project Name   | DPS - FS - Fire Safety Records Management System Replacement |                                     |  |                                  |           |  |  |  |  |  |
| Agency/Department  | Department of Public Safety (DPS)                            |                                     | Current Project Phase  |                                  | Execution |  |  |  |  |  |
| Original Project Start Date  | 3/1/2022   | Original Project Estimated End Date | 6/21/2026  | Number of Change Orders Approved | 0         |  |  |  |  |  |
| Actual Start Date  | 2/16/2025  | Current Estimated End Date          | 6/21/2026  |                                  |           |  |  |  |  |  |
| Project  | Status   |                                     | Update   |                                  |           |  |  |  |  |  |
| Scope  | ON TRACK   |                                     | The project will replace the current records management workflow and database with a flexible, modern platform that reduces manual processes, improves public accessibility and security and allows for budgeted costs. Some of the workflow modules included in the upgrade are Plan Review, Inspection and Enforcement.  |                                  |           |  |  |  |  |  |
| Schedule   | ON TRACK   |                                     | The project was initially expected to be completed by July 2023. However, due to an extended procurement phase that involved multiple reposting of the RFP, the estimated completion date was revised to December 2025. An independent review was completed in October 2024, and the vendor contract was signed in December 2024. The project is now anticipated to be finished by August 2026.  |                                  |           |  |  |  |  |  |
| Budget   | NEEDS LEADERSHIP INTERVENTION                                |                                     | The initial project cost estimate was baselined during exploration at \$2,232,766. The project cost has been rebasedlined to \$3,182,073 after the revised project estimate was approved. ADS labor time was added for to ensure vendor performance and application quality remained high. The current project actual cost for October 2025 is \$439,615. Should the project schedule, scope or cost change as the project progresses the budget will be updated to reflect the changes. |                                  |           |  |  |  |  |  |
| Overall  | MANAGEABLE RISK  |                                     |  |                                  |           |  |  |  |  |  |
| Scope Summary  |  |                                     |  |                                  |           |  |  |  |  |  |
| The DPS Fire Safety Records Management System Replacement project is a groundbreaking effort to update and enhance the management of fire safety records in Vermont. This initiative aims to replace the outdated proprietary software that has been in use since 1985, which has become costly and challenging to upgrade. The current system lacks essential modern features such as digital document management, an online portal, payment processing, and continuing education management, which have limited the department's service efficiency and ability to meet stakeholder needs. |  |                                     |  |                                  |           |  |  |  |  |  |

The new system will be developed on a modern and adaptable platform, allowing Fire Safety to minimize manual tasks, enhance public access and security, and stay within budget. With digital document management, records will be easily searchable and accessible, eliminating the need for physical storage and reducing the risk of document loss or damage. The introduction of an online portal will offer Fire Safety partners and customers a convenient and user-friendly way to access and manage their records, including the ability to make secure online payments. Additionally, the system will support continuing education management, helping fire safety professionals track and maintain their certifications.

By replacing the outdated system, the DPS Fire Safety division is dedicated to improving efficiency, accessibility, and security. The new platform will provide stakeholders with modern tools and features to effectively manage fire safety records and comply with regulatory requirements. This project is a crucial step in modernizing fire safety records management in Vermont, demonstrating a commitment to delivering efficient and effective services to the community.

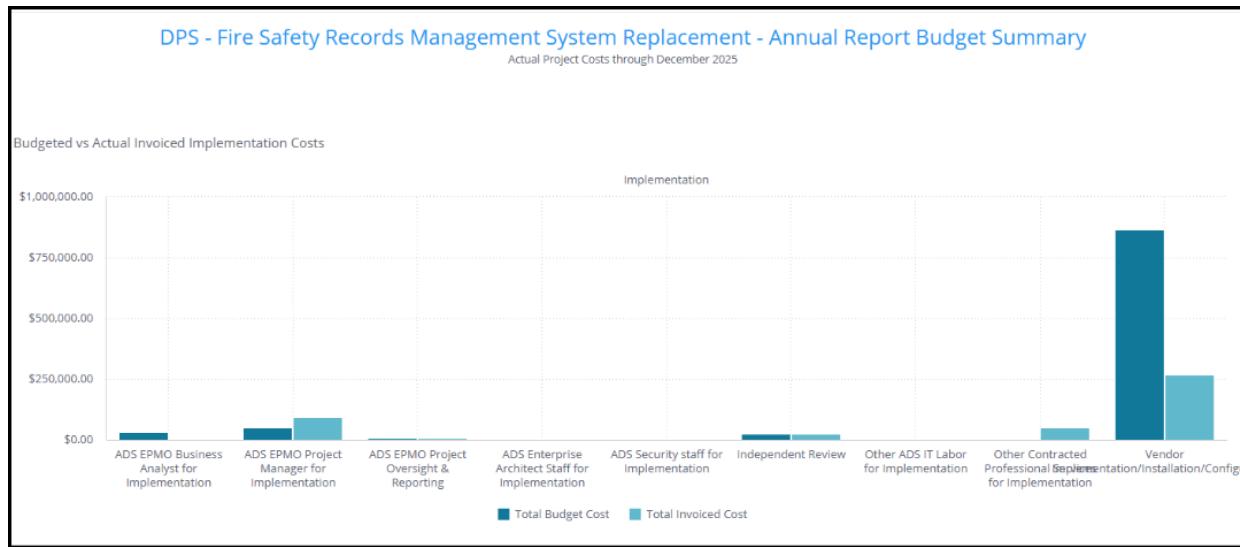
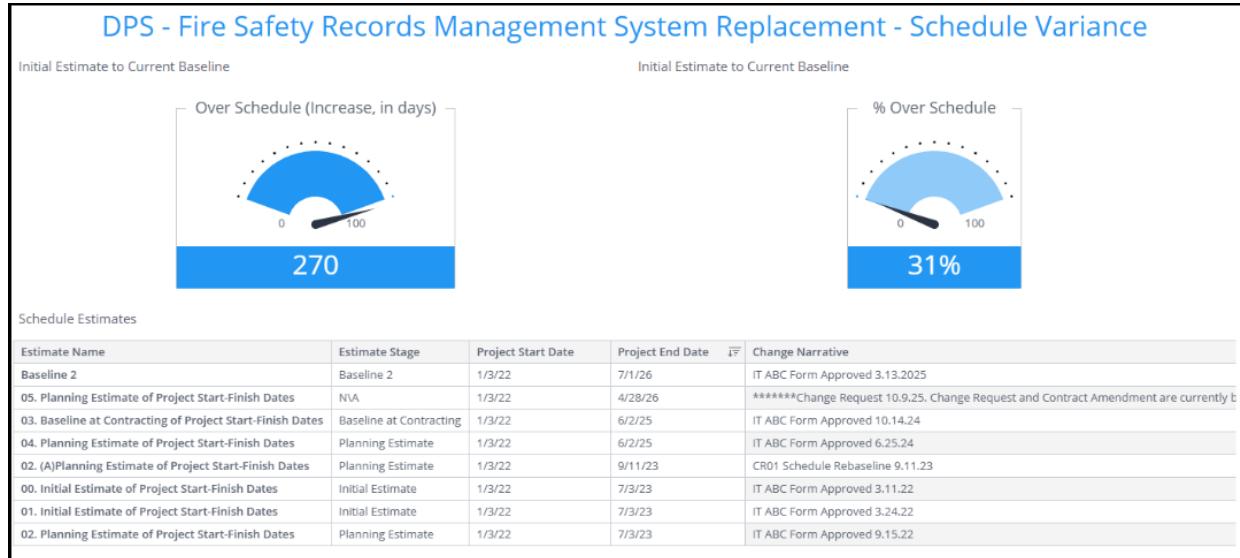
#### **Schedule Summary**

This project procurement process was delayed due to repeated postings of the Request for Proposal (RFP) because of low vendor response rates and issues with the vendor response bids. Initial bidder selection activity commenced in August 2023, and a preferred vendor was identified. After the vendor was chosen, a vendor implementation contract was executed in December 2024. The implementation is expected to be completed by August 2026.

#### **Budget Summary**

| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
|---|---|---|
| \$1,436,190.00                                      | \$1,514,522.00  | OVER BUDGET   |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
| \$1,676,485.00                                      | \$1,676,485.00  | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$3,112,675.00                                      | \$3,191,007.00  | OVER BUDGET   |
| <b>Solution Lifecycle Years</b>                     | 5   |   |

## Schedule Variance and Budget to Actuals Charts



| IT ACTIVITY ANNUAL SUMMARY REPORT |                                   |                                     |   |                                  |           |
|-----------------------------------|-----------------------------------|-------------------------------------|---|----------------------------------|-----------|
| Project Name                      | DPS - VFL LIIMS                   |                                     |   |                                  |           |
| Agency/Department                 | Department of Public Safety (DPS) |                                     | Current Project Phase   |                                  | Execution |
| Original Project Start Date       | 10/3/2022                         | Original Project Estimated End Date | 12/31/2025  | Number of Change Orders Approved | 1         |
| Actual Start Date                 | 11/1/2023                         | Current Estimated End Date          | 12/31/2025  |                                  |           |
| Project                           | Status                            |                                     | Update  |                                  |           |
| Scope                             | ON TRACK                          |                                     | The scope of the project was defined in the contract and aims to replicate all existing forensic data storage and reporting that is in the current on-premises system with a cloud-based system. A change request was executed to delay partial payment of the final implementation milestone until all security issues have been remediated and re-tested to the satisfaction of the State.  |                                  |           |
| Schedule                          | ON TRACK                          |                                     | The initial IT ABC signed on 9/30/2022 defined the project schedule as starting on 10/1/2022 and ending on 12/30/2022. Issues with contract negotiations relating to changes in State standard Terms and Conditions from an existing contract between the selected vendor and the state caused extensive delays. As a result, the IT ABC was updated with completion scheduled to 4/30/2024. The contract was executed on 11/2/2023 with implementation starting shortly thereafter. Issues in implementation of legacy reports and delays in getting vendor staff access to systems required the completion date to be revised to Dec 30, 2024. Vulnerabilities identified during penetration (security) testing and required patching have extended the project completion to Dec 30, 2025. |                                  |           |
| Budget                            | ON TRACK                          |                                     | The original project budget during exploration was expected to be \$351,000 based on assumed costs for the solution and rapid implementation. The lifecycle cost was revised to \$721,740.65 in October of 2023 to account for increases in State costs due to delays in contract execution as well as revised licensing and implementation costs finalized during contract negotiation and execution. In March of 2025, the budget was reconciled with costs to date and to address a Change order to modify payment milestones resulting in a current total lifecycle cost estimate of  |                                  |           |

|   |   |   |
|---|---|---|
|   |   | \$628,648.67. Currently project costs incurred are \$293,473.00 and are within the overall approved budget. |
| Overall   | ON TRACK  |   |
| <b>Scope Summary</b>  |   |   |
| <p>The Vermont Forensic lab (VFL) is the only forensic laboratory in the State of Vermont and provides services to the entire criminal justice system. The VFL uses an older on-premise Laboratory Information Management System (LIMS) from Caliber, Inc called Forensic Advantage. The use of LIMS is a requirement for VFL to maintain its accreditation and is used to record all forensic data associated with cases that are handled at VFL. The scope of this project is to upgrade the current on-premise LIMS with a cloud-based solution from Caliber (the current vendor). A cloud based solution offers greater continuity in the event of a disaster and aligns with ADS's Cloud first strategy.</p> |   |   |
| <b>Schedule Summary</b>   |   |   |
| <p>Penetration (security) testing revealed vulnerabilities that required patching by the vendor, extending the project completion from the original projected Dec 30, 2024 date to Dec 30, 2025.</p>  |   |   |
| <b>Budget Summary</b>   |   |   |
| <b>Total Original Estimated Implementation Cost</b>   | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b>   |
| \$164,092.00  | \$171,000.00  | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>  | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>   |
| \$457,648.65  | \$457,648.67  | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>  | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>   |
| \$621,740.65  | \$628,648.67  | ON TRACK  |
| <b>Solution Lifecycle Years</b>   | 5   |   |

## Schedule Variance and Budget to Actuals Charts

### DPS VFL LIMS Replacement Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

416

% Over Schedule

103%

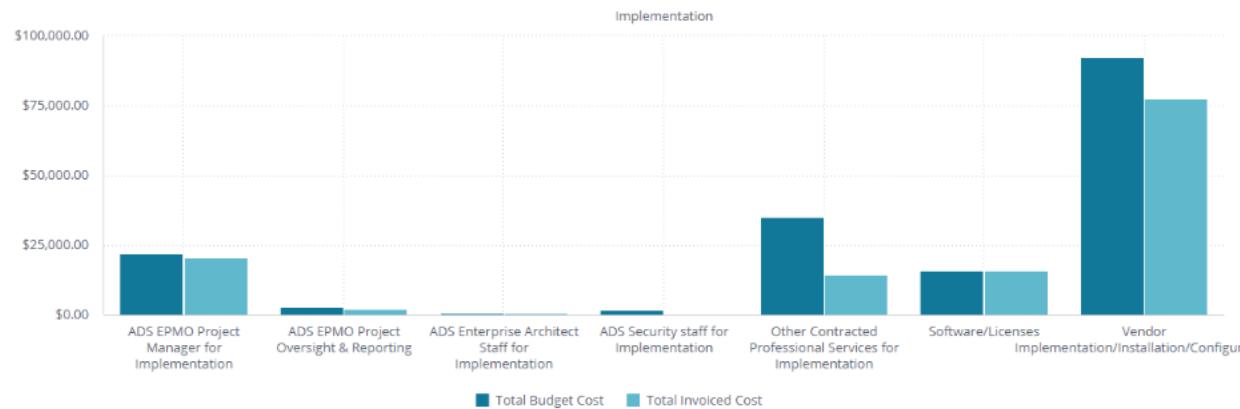
#### Schedule Estimates

| Estimate Name   | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|---|-------------------------|--------------------|------------------|---|
| CO 001 Extension of Time Estimated Project Completion       | Baseline 2              | 10/3/22            | 12/31/25         | Version 3 of the project IT ABC accounted for delays resulting from solution updates required in order to address security vulnerabilities identified during penetration testing in the fall of 2024 and was signed June 7, 2025. |
| Baseline @ Contracting Estimated Project Start-Finish Dates | Baseline at Contracting | 10/3/22            | 4/30/24          | The schedule defined at contract execution accounted for extensive contract negotiations and was based on the contractor's schedule.  |
| Initial Estimated Project Start-Finish Dates                | Initial Estimate        | 10/3/22            | 12/30/22         | The original IT ABC signed Sept 30, 2022 expected a short-duration implementation and upgrade with the current vendor.  |

### DPS VFL LIMS Budget Summary

Actual Project Costs through September 2025

#### Budgeted vs Actual Invoiced Implementation Costs





# Secretary of State (SOS)

| IT ACTIVITY ANNUAL SUMMARY REPORT   |                            |                                     |   |                                  |         |  |  |  |  |  |
|---|----------------------------|-------------------------------------|---|----------------------------------|---------|--|--|--|--|--|
| Project Name  | SOS Business Filing System |                                     |   |                                  |         |  |  |  |  |  |
| Agency/Department   | Other Secretary of State   |                                     | Current Project Phase   |                                  | Closing |  |  |  |  |  |
| Original Project Start Date   | 1/31/2025                  | Original Project Estimated End Date | 1/31/2025   | Number of Change Orders Approved | 1       |  |  |  |  |  |
| Actual Start Date   | 2/12/2024                  | Current Estimated End Date          | 1/31/2025   |                                  |         |  |  |  |  |  |
| Project   | Status                     |                                     | Update  |                                  |         |  |  |  |  |  |
| Scope   | ON TRACK                   |                                     | The baseline scope includes full replacement of the VT Secretary of State's business services platform including uniform commercial code, and temporary officiant processing. There is one change request to utilize the vendor's Azure Cloud for document management instead of the State's OnBase instance. |                                  |         |  |  |  |  |  |
| Schedule  | ON TRACK                   |                                     | The project implementation started 12/11/25 and was successfully launched on 12/15/2024. The original baseline go-live was 12/13/2024.  |                                  |         |  |  |  |  |  |
| Budget  | ON TRACK                   |                                     | The baseline budget for implementation at contract was established at \$3,483,272.33. The actual cost to implement was \$3,090,760.00. Due to a change request, which impacted annual maintenance costs, the contract increased 4.83% from \$4,790,303.76 to \$5,021,503.76.                                  |                                  |         |  |  |  |  |  |
| Overall   | ON TRACK                   |                                     |   |                                  |         |  |  |  |  |  |
| Scope Summary   |                            |                                     |   |                                  |         |  |  |  |  |  |
| <p>The SOS Business Filing System Project is a transformative initiative that seeks to modernize and streamline business services provided by the Vermont Secretary of State's Office. By replacing the existing Business Services Platform, the project aims to enhance efficiency, accessibility, and security in managing various applications, including UCC filings. The scope of the project includes the implementation of a comprehensive suite of services applications, including document management and electronic filing systems. These applications will enable businesses and individuals to easily submit and manage their filings online, reducing the need for manual paperwork and streamlining the overall process. Software modernization is a key component of the project, ensuring that the new system is built on the latest technology and can accommodate future enhancements and updates. This modernization effort will improve system performance, reliability, and scalability, providing a robust foundation for business services. Incorporating cyber security compliances is a top priority for the SOS Business Filing System Project. The new system will adhere to industry best practices and regulatory requirements to ensure the protection of sensitive business information and personal data. By implementing robust security measures, the project aims to safeguard the integrity and confidentiality of business filings and maintain public trust. The SOS Business Filing System Project represents a commitment to providing businesses and individuals with a user-friendly and efficient platform for managing their filings. The new system will enhance accessibility, allowing users to easily search, retrieve, and track their documents. It will also provide real-time updates and notifications, ensuring timely and accurate information for all stakeholders. The SOS Business Filing System Project is a significant step towards</p> |                            |                                     |   |                                  |         |  |  |  |  |  |

modernizing and improving business services provided by the Vermont Secretary of State's Office. By replacing the existing Business Services Platform with a modernized system that incorporates document management, electronic filing systems, software modernization, and cyber security compliance, the 121 project aims to enhance efficiency, accessibility, and security. This initiative represents the commitment of the office to support businesses and individuals in their filing processes and contribute to a thriving business environment in Vermont.

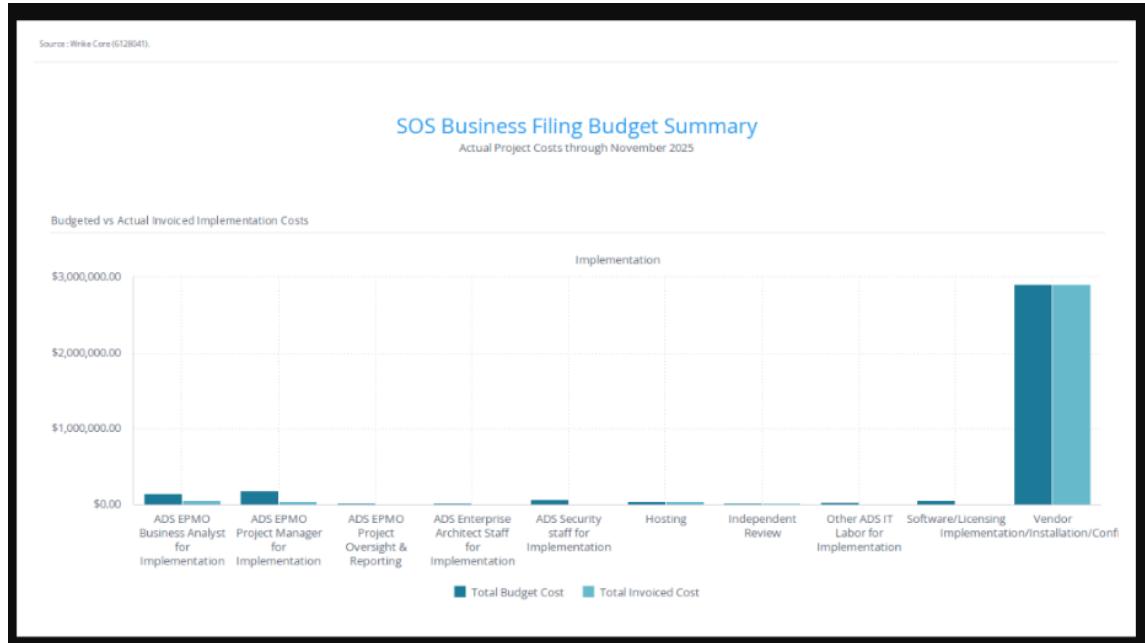
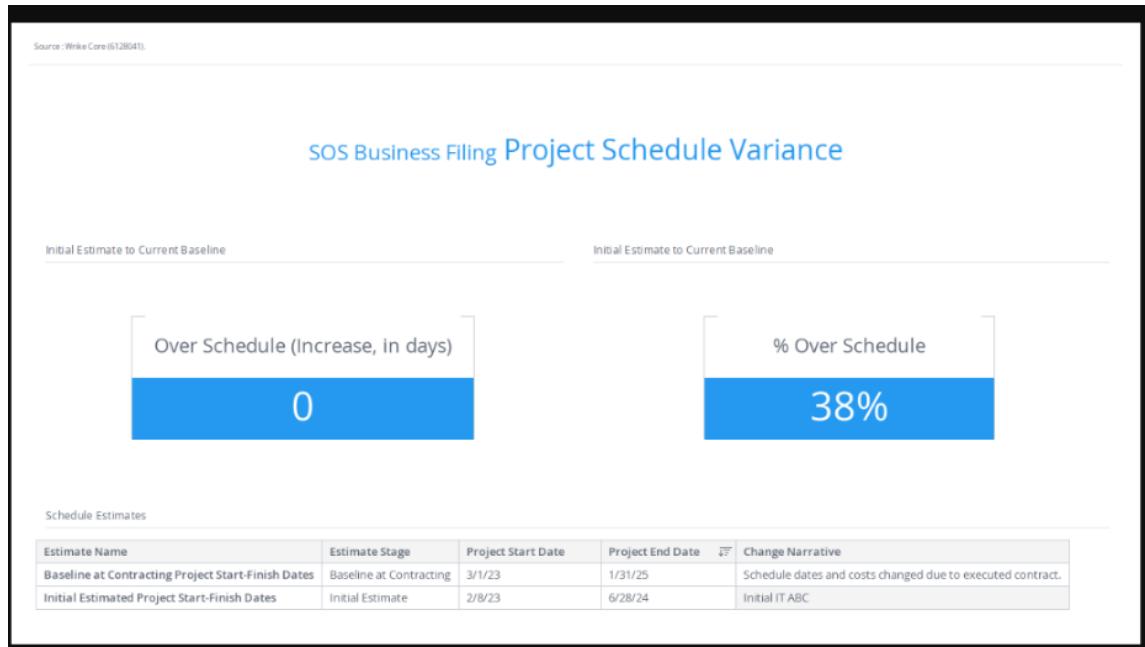
#### Schedule Summary

The project was successfully implemented on 12/15/24.

#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$3,508,272.33                               | \$3,090,408.33                                 | UNDER BUDGET                                   |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,780,931.00                               | \$2,012,131.00                                 | OVER BUDGET                                    |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$5,289,203.33                               | \$5,102,539.33                                 | UNDER BUDGET                                   |
| Solution Lifecycle Years                     | 5  |  |

## Schedule Variance and Budget to Actuals Charts



| IT ACTIVITY ANNUAL SUMMARY REPORT  |                                    |                                     |  |                                  |           |  |  |  |  |  |
|--|------------------------------------|-------------------------------------|--|----------------------------------|-----------|--|--|--|--|--|
| Project Name   | SOS - Elections System Replacement |                                     |  |                                  |           |  |  |  |  |  |
| Agency/Department  | Other Secretary of State           |                                     | Current Project Phase  |                                  | Execution |  |  |  |  |  |
| Original Project Start Date  | 10/10/2022                         | Original Project Estimated End Date | 6/6/2025   | Number of Change Orders Approved | 0         |  |  |  |  |  |
| Actual Start Date  | 9/5/2023                           | Current Estimated End Date          | 6/6/2025   |                                  |           |  |  |  |  |  |
| Project  | Status                             |                                     | Update   |                                  |           |  |  |  |  |  |
| Scope  | ON TRACK                           |                                     | There were no significant changes to the scope of the project during its duration.   |                                  |           |  |  |  |  |  |
| Schedule   | ON TRACK                           |                                     | The schedule was re-baselined to reflect a change in go-live from February 2025 to May 2025 and it finished according to the re-baselined schedule. The delay in the project was due to additional training needs, SOS staff availability, and some critical bugs found during go-live. There were no implementation cost impacts to the 3-month pushback of go-live from February 2025 to May 2025. |                                  |           |  |  |  |  |  |
| Budget   | ON TRACK                           |                                     | No charges are currently being made against this project and will not during project closeout. \$3,851,670 was spent out of an implementation budget of \$3,416,004  |                                  |           |  |  |  |  |  |
| Overall  | ON TRACK                           |                                     |  |                                  |           |  |  |  |  |  |
| Scope Summary  |                                    |                                     |  |                                  |           |  |  |  |  |  |
| The SOS Elections System Replacement Project is a transformative initiative that seeks to modernize and streamline election management processes in Vermont. By replacing the current election management system, the project aims to enhance efficiency, transparency, and accessibility in managing elections, campaign finance, and lobbying activities. The project scope includes a full replacement of the existing election management system, ensuring that the new system is equipped with robust features and capabilities. This comprehensive approach will enable the Secretary of State's Office to effectively manage all aspects of elections, including voter registration, ballot management, candidate filing, and result reporting. The SOS Elections System Replacement Project is driven by the goal of enhancing efficiency and accessibility for both election officials and the public. The new system will provide user-friendly interfaces and streamlined workflows, making it easier for election officials to manage elections and for candidates to navigate the campaign finance and lobbying processes. This initiative reflects the 123 commitment of the Secretary of State's Office to uphold the integrity of elections. |                                    |                                     |  |                                  |           |  |  |  |  |  |
| Schedule Summary   |                                    |                                     |  |                                  |           |  |  |  |  |  |
| The implementation for the main election system replacement is complete. The system was initially expected to go live in February 2025, but was pushed to May 2025 to allow time for training and bug fixes. Project is currently in closeout, awaiting lessons learned response from SOS.   |                                    |                                     |  |                                  |           |  |  |  |  |  |
| Budget Summary   |                                    |                                     |  |                                  |           |  |  |  |  |  |

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$4,734,232.00                               | \$4,734,232.00                                 | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$2,835,700.00                               | \$2,835,700.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$7,569,932.00                               | \$7,569,932.00                                 | ON TRACK                                       |
| Solution Lifecycle Years                     | 5  |  |

### Schedule Variance and Budget to Actuals Charts

#### SOS Elections Management System Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



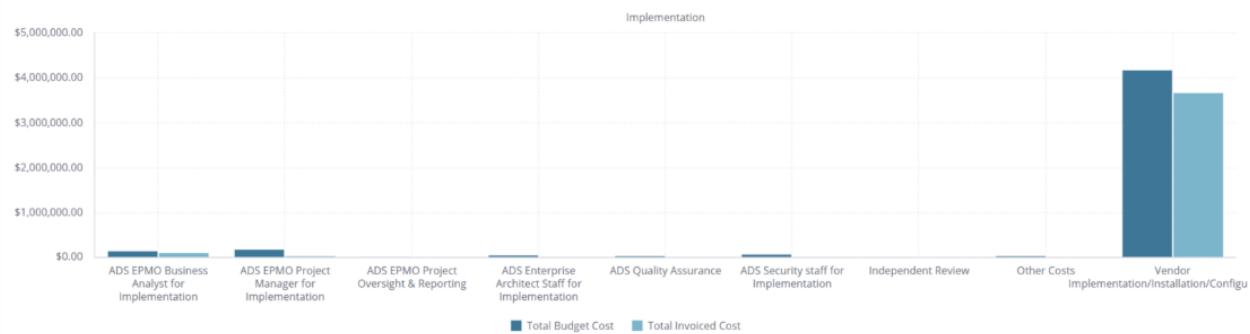
#### Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative           |
|--|-------------------------|--------------------|------------------|----------------------------|
| UAT 3 Extension Estimate                     | Baseline 2              | 10/10/22           | 5/5/25           | 2 weeks for UAT 3/Training |
| Contract Execution Estimate                  | Baseline at Contracting | 10/10/22           | 4/21/25          | Contract baseline          |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 10/10/22           | 4/30/24          | Initial ABC                |

## SOS Elections Annual Report Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs





# Other Executive Branch Projects

| IT ACTIVITY ANNUAL SUMMARY REPORT   |                                      |                                     |   |                                  |           |  |  |  |  |  |
|---|--------------------------------------|-------------------------------------|---|----------------------------------|-----------|--|--|--|--|--|
| Project Name  | AGO - Case Management System Project |                                     |   |                                  |           |  |  |  |  |  |
| Agency/Department   | Other Attorney General's Office      |                                     | Current Project Phase   |                                  | Execution |  |  |  |  |  |
| Original Project Start Date   | 7/1/2022                             | Original Project Estimated End Date | 11/30/2027  | Number of Change Orders Approved | 0         |  |  |  |  |  |
| Actual Start Date   | 9/26/2025                            | Current Estimated End Date          | 11/30/2027  |                                  |           |  |  |  |  |  |
| Project   | Status                               |                                     | Update  |                                  |           |  |  |  |  |  |
| Scope   | MANAGEABLE RISK                      |                                     | The baseline scope of this project involves setting up a case management system specifically designed for handling both prosecutor and civil cases. Overall, this system aims to streamline case management, enhance security, and improve efficiency in handling legal cases |                                  |           |  |  |  |  |  |
| Schedule  | ON TRACK                             |                                     | The contract with the vendor was finalized on August 18, 2025. The implementation is scheduled to be 27 months.   |                                  |           |  |  |  |  |  |
| Budget  | ON TRACK                             |                                     | The total implementation costs, which include expenses outlined in the vendor contract as well as all other associated implementation costs, such as state staff, are estimated to be \$1,908,662.00  |                                  |           |  |  |  |  |  |
| Overall   | ON TRACK                             |                                     |   |                                  |           |  |  |  |  |  |
| Scope Summary   |                                      |                                     |   |                                  |           |  |  |  |  |  |
| <p>The AGO Case Management System project is a significant initiative aimed at enhancing legal case management within the Attorney General's Office. By implementing a new case management system, we aim to improve user experiences, increase productivity, and enhance information sharing, tracking, and reporting capabilities across the AGO. The new case management system will be utilized by all divisions and units within the AGO, providing a centralized platform for managing legal cases. This includes staff associated with 14 client agencies/departments, Diversion and Pre-Trial Services providers, and Consumer Assistance Program staff at the University of Vermont. By utilizing a single system, we can streamline processes, improve collaboration, and enhance the overall efficiency of case management within the AGO. The project's objectives include improving user experiences, ensuring that the system is intuitive, user-friendly, and tailored to the specific needs of AGO staff. This will enhance productivity and reduce the learning curve associated with adopting a new system. By providing a seamless and efficient user experience, we can maximize the benefits of the case management system. Furthermore, the new system will enhance information sharing, tracking, and reporting capabilities. It will enable AGO staff to easily access and share case-related information, improving collaboration and communication among different units and divisions. The system will also provide robust tracking and reporting functionalities, allowing for comprehensive analysis and reporting on case outcomes and performance. The AGO Case Management System project represents our commitment to leveraging technology to enhance legal case management within the Attorney General's Office. By implementing a new system, we aim to improve productivity, streamline processes, and enhance information sharing and reporting capabilities. Ultimately, this project will contribute to improved outcomes and more efficient. We remain dedicated to the successful implementation of the AGO Case Management System, ensuring that the system meets the specific needs of AGO staff</p> |                                      |                                     |   |                                  |           |  |  |  |  |  |

and supports their mission to provide effective legal services to the State of Vermont. Through this project, we are advancing case management practices and supporting the AGO in their pursuit of justice and positive outcomes. operations within the AGO.

#### **Schedule Summary**

The implementation schedule is organized into five divisions: 1) Criminal, 2) Administrative & Civil, 3) Environmental and Public Protection, 4) Health and Human Services Agency, and 5) General Counsel and Administrative Law. The State and the vendor will collaborate to establish the sequence in which these divisions will be implemented. The entire process, from initiation to completion, including the transition to ongoing support and maintenance, is expected to span 27 months.

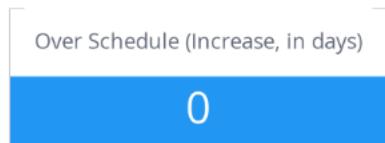
#### **Budget Summary**

| <b>Total Original Estimated Implementation Cost</b> | <b>Total Current Estimated Implementation Cost</b>    | <b>Budget Status – On Track, Over or Under Budget</b> |
|---|---|---|
| \$1,908,662   | \$1,908,662   | ON TRACK  |
| <b>Total Original Estimated Operating Cost</b>      | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b>           |
| \$1,675,000   | \$1,675,000   | ON TRACK  |
| <b>Total Original Estimated IT Activity Cost</b>    | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b>           |
| \$3,583,662   | \$3,583,662   | ON TRACK  |
| <b>Solution Lifecycle Years</b>                     | 5   |   |

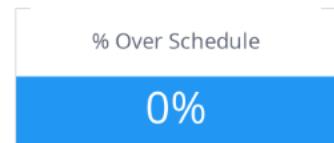
## Schedule Variance and Budget to Actuals charts

### AGO CMS Project Schedule Variance

Initial Estimate to Current Baseline

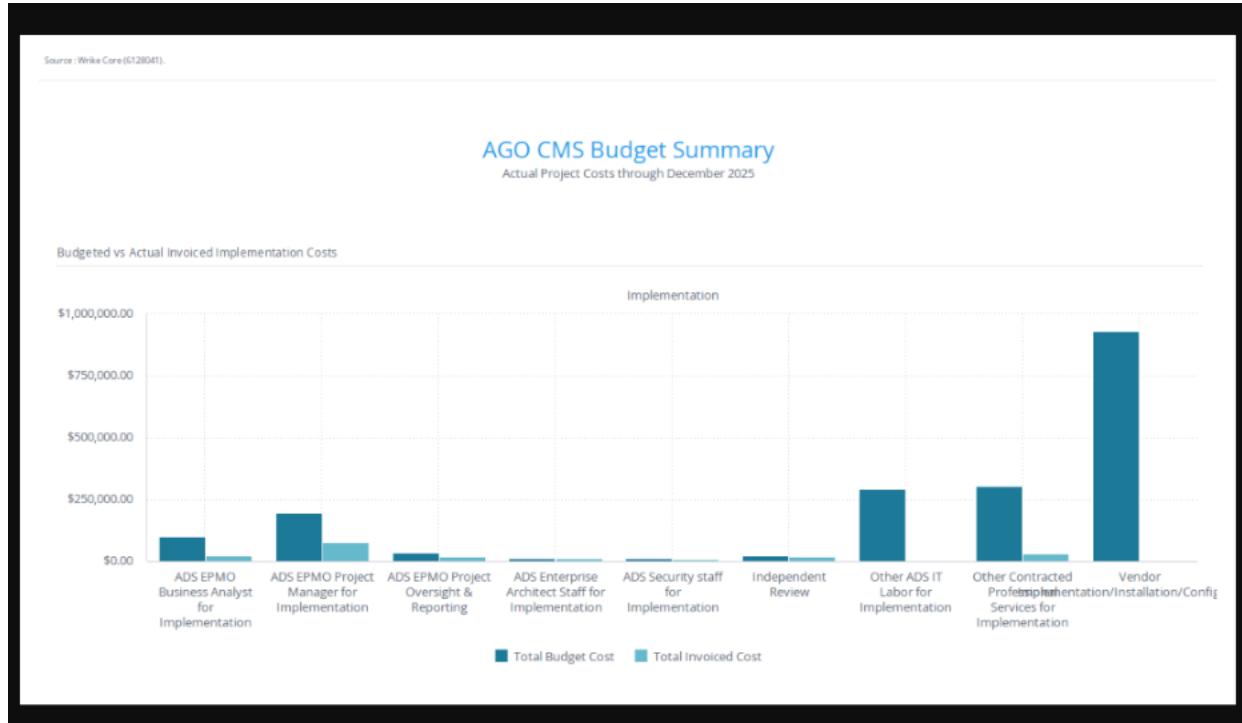


Initial Estimate to Current Baseline



Schedule Estimates

| Estimate Name  | Estimate Stage          | Project Start Date | Project End Date | Change Narrative                                     |
|--|-------------------------|--------------------|------------------|--|
| Based on the executed contract with Vendor, Project Start-Finish Dates | Baseline at Contracting | 7/1/22             | 11/30/27         | Schedule rebaselined based on executed contract      |
| Planning based on Selected Vendor Project Start-Finish Dates copy      | Planning Estimate       | 7/1/22             | 11/30/26         | Procurement took longer than estimated. New estimate |
| Initial Estimated Project Start-Finish Dates                           | Initial Estimate        | 7/1/22             | 2/27/26          | Based on initial IT ABC form                         |



| IT ACTIVITY ANNUAL SUMMARY REPORT |   |                                     |  |                                  |           |
|-----------------------------------|---|-------------------------------------|--|----------------------------------|-----------|
| Project Name                      | DLL - Business 2 Business eCommerce Website |                                     |  |                                  |           |
| Agency/Department                 | Department of Liquor and Lottery            |                                     | Current Project Phase  |                                  | Execution |
| Original Project Start Date       | 4/1/2022                                    | Original Project Estimated End Date | 6/30/2026  | Number of Change Orders Approved | 0         |
| Actual Start Date                 | 5/5/2025                                    | Current Estimated End Date          | 6/30/2026  |                                  |           |
| Project                           | Status                                      |                                     | Update   |                                  |           |
| Scope                             | ON TRACK                                    |                                     | Scope was established in the form of user stories and acceptance criteria and have been approved by the business and outline in the executed contract. In order to complete the scope for the eCommerce solution, the department's existing D365 inventory system needs extensive updates. |                                  |           |

|  |  |  |
|--|--|--|
| Schedule   | ON TRACK   | The schedule has been outlined through execution and to reflect the post-implementation support period through April 1, 2026, with a pilot go-live date of 9/30 and a solution go live date of October 28, 2025. |
| Budget   | ON TRACK   | The updated IT ABC for implementation costs from the selected vendor and state implementation costs of \$540,097.00. A Contract Amendment was executed to reflect a \$725,500.00 cost increase.                  |
| Overall  | ON TRACK   |  |
| <b>Scope Summary</b>   |  |  |
| <p>The Liquor Division's B2B eCommerce website is set to revolutionize the way DLL licensed establishments conduct their purchases from the 802Spirit stores. By providing a centralized and searchable portal, the division aims to enhance cost efficiency and streamline the ordering process. Licensees will now have the convenience of placing orders online, eliminating the need for manual paperwork and reducing administrative burdens. The online ordering capabilities will enable licensees to browse through a comprehensive catalog of spirits, select the desired products, and place orders with just a few clicks. This efficient process will save time and resources, allowing licensees to focus on serving their customers. The inventory search feature, coupled with a store locator, will empower Licensed Establishments (Restaurants, bars, etc.) to easily find the products they need. They can search for specific spirits, check availability, and locate nearby stores that carry the desired items. Consumers will not be using the eCommerce website, only the licensed establishments (Restaurants, Bars, etc.) This feature ensures that licensed establishments can quickly restock their inventory and meet customer demands without any hassle. In cases where a particular product is out of stock, the B2B eCommerce website will provide comparable items as alternatives. This feature allows licensed establishments to offer similar products to their customers. For example, if a licensed establishment cannot find the brand of liquor they typically utilize, the solution will offer them a similar alternative. Scheduled pick-up times will further enhance the convenience for licensees. They will have the flexibility to choose a time slot that suits their operational needs, ensuring a smooth and efficient pick-up process. Lastly, the ability to make online payments adds another layer of convenience and efficiency. Licensees can securely complete transactions online, eliminating the need for manual payment processing and reducing the risk of errors. The Liquor Divisions B2B eCommerce website is a game-changer for the DLL licensees, but providing a searchable portal with online ordering capabilities, inventory searches, comparable items, scheduled pick-up times, and online payment options. The division is committed to improving cost efficiency and streamlining spirit sales for licensees. This initiative will not only benefit licensees but also contribute to the overall growth and success of the liquor industry in Vermont.</p> |  |  |
| <b>Schedule Summary</b>  |  |  |
| <p>The overall project schedule was mutually agreed upon between Provi and Accenture to align within Accenture's 16-week implementation plan. The project is currently in the Execution Phase, and completed the Pilot Go-Live on 9/30. The project team is supporting the pilot go-live and fixing the few issues that have been identified so far. The next milestone will be the general go-live, taking place at the end of October, after which the project team will focus on go-live support and implementation of the remaining aspects of the project. The project team is anticipating the end of the execution phase in early 2026.</p>   |  |  |
| <b>Budget Summary</b>  |  |  |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b> | <b>Budget Status – On Track, Over or Under Budget</b>  |
| \$3,100,097.00   | \$3,772,459.13                                     | ON TRACK   |

| Total Original Estimated Operating Cost   | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget |
|---|--|--------------------------------------|
| \$709,200.00                              | \$709,200.00                                   | ON TRACK                             |
| Total Original Estimated IT Activity Cost | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget |
| \$3,809,297.00                            | \$4,481,659.13                                 | ON TRACK                             |
| Solution Lifecycle Years                  | 5  |                                      |

#### Schedule Variance and Budget to Actual Charts

## DLL eCommerce Project Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline

Over Schedule (Increase, in days)

269

% Over Schedule

33%

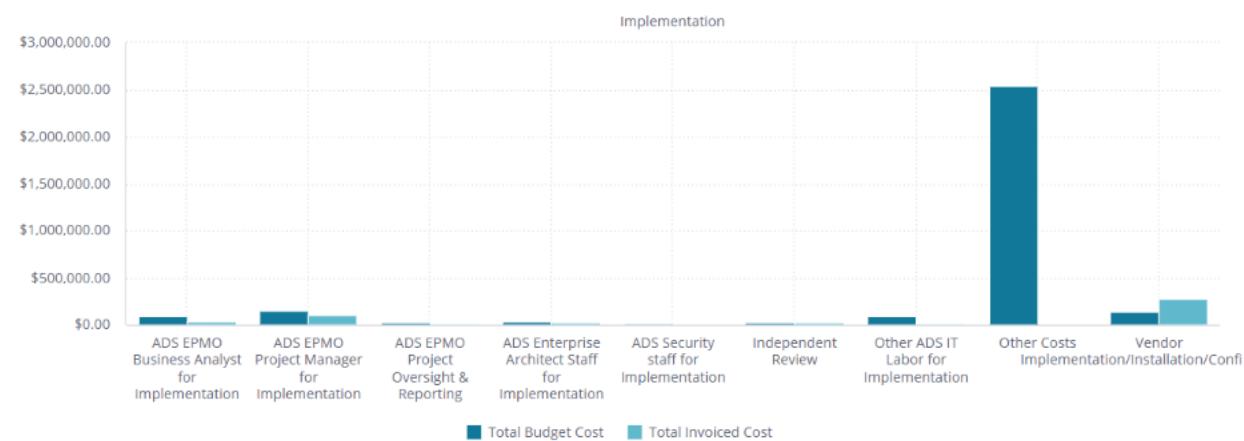
Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative   |
|--|-------------------------|--------------------|------------------|--|
| Baseline 3 Change Request                    | Baseline 3              | 4/1/22             | 6/30/26          | Change Request from November 2025. Changes the end date      |
| Baseline 2 (Updated IT ABC)                  | Baseline 2              | 4/1/22             | 10/1/25          | Updated IT ABC Form. The Schedule is on track but needs a ch |
| Baseline at Contracting                      | Baseline at Contracting | 4/1/22             | 6/2/25           | IT ABC Form at Contracting                                   |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 4/1/22             | 1/2/24           | Initial IT ABC Estimate                                      |

## DLL eCommerce Connectivity Budget Summary

Actual Project Costs through October 2025

Budgeted vs Actual Invoiced Implementation Costs



## IT ACTIVITY ANNUAL SUMMARY REPORT

|   |                               |  |  |   |  |  |  |  |
|---|-------------------------------|--|--|---|--|--|--|--|
| <b>Project Name</b>   | LURB - Act 250 Scanning       |  |  |   |  |  |  |  |
| <b>Agency/Department</b>  | Other Natural Resources Board |  | <b>Current Project Phase</b>   | Execution                               |  |  |  |  |
| <b>Original Project Start Date</b>  | 7/1/2021                      | <b>Original Project Estimated End Date</b> | 6/30/2026  | <b>Number of Change Orders Approved</b> |  |  |  |  |
| <b>Actual Start Date</b>  | 10/23/2023                    | <b>Current Estimated End Date</b>          | 6/30/2026  |   |  |  |  |  |
| <b>Project</b>  | <b>Status</b>                 |  | <b>Update</b>  |   |  |  |  |  |
| <b>Scope</b>  | <b>ON TRACK</b>               |  | The baseline scope includes scanning St. Johnsbury and Essex, VT facilities paper legacy permit folder files and making those newly digitized files accessible to public and staff online. The contact with the scanning vendor is structured as a not to exceed amount, allowing the NRB to scan the maximum amount of files for the appropriated project budget. It is unclear at this time if all files will be able to be scanned for the total budget amount of \$500,000, which includes other costs in addition to the scanning vendor. |   |  |  |  |  |
| <b>Schedule</b>   | <b>ON TRACK</b>               |  | The contract was executed on 10/17/2023. There are no known schedule issues at this time. Due to ARPA funding the money must be expended by June 2026.   |   |  |  |  |  |
| <b>Budget</b>   | <b>ON TRACK</b>               |  | The baseline budget was established at \$500,000, actual cost to date equal \$226,230.45, which indicate we are on track. The budget continues to be monitored. This project will utilize ARPA funding (\$500,000) which was authorized by the legislature. ARPA Funds must be obligated by end of 2024 and expend by end of June 2026.  |   |  |  |  |  |
| <b>Overall</b>  | <b>ON TRACK</b>               |  |  |   |  |  |  |  |
| <b>Scope Summary</b>  |                               |  |  |   |  |  |  |  |
| The Natural Resources Board (NRB) Act 250 Scanning Project is a vital endeavor that seeks to digitize and preserve decades' worth of land use permit documents in Vermont. By converting physical records into digital format, the project aims to improve accessibility, streamline information retrieval, and ensure the long-term preservation of these valuable resources. The project scope encompasses the digitization of all NRB land use permit documents from 1970 to 2017, specifically from the St. Johnsbury and Essex facilities. This comprehensive approach ensures that a significant portion of Vermont's land use history is captured and made accessible to the public. Once digitized, these documents will be stored in a secure and organized manner, allowing for easy retrieval through the public Act 250 database website. This digital platform will provide the public with convenient access to historical land use permit records, fostering transparency and supporting informed decision-making. The benefits of the Act 250 Scanning Project extend beyond improved accessibility. By digitizing these records, the NRB can reduce reliance on physical storage, saving valuable space and resources. Additionally, the digital format enhances the preservation of these documents, safeguarding them from potential damage or loss due to physical deterioration. The Act 250 Scanning Project aligns with the NRB's commitment to efficient and transparent land use management. By making |                               |  |  |   |  |  |  |  |

these records easily accessible to the public, the project promotes public engagement and participation in the decision-making process. It also supports the NRB's mission to protect and sustain Vermont's natural resources for future generations. The NRB Act 250 Scanning Project is a significant step towards preserving Vermont's land use history and enhancing public access to valuable records. By digitizing all NRB land use permit documents from 1970 to 2017 and making them retrievable 135 through the public Act 250 database website, the project ensures transparency, efficiency, and the long-term preservation of these important resources.

#### Schedule Summary

This digitization effort is divided into the three major stages: Stage 1: State prepares paper documents and boxes and engages in custody transfer. Stage 2: Vendor engages in digitization, digital file upload, box transport, and custody transfer, which includes Proof of Concept with two boxes of materials. Stage 3: State engages in post-scanning processes.

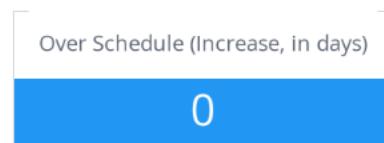
#### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$443,000.00                                 | \$443,000.00                                   | ON TRACK                                       |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$57,000.00                                  | \$57,000.00                                    | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$500,000.00                                 | \$500,000.00                                   | ON TRACK                                       |
| Solution Lifecycle Years                     | 3  |  |

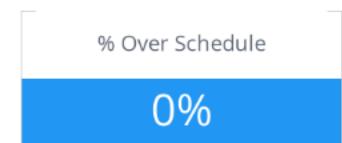
#### Schedule Variance and Budget to Actuals Charts

## LURB Act 250Scanning Project Schedule Variance

Initial Estimate to Current Baseline



Initial Estimate to Current Baseline



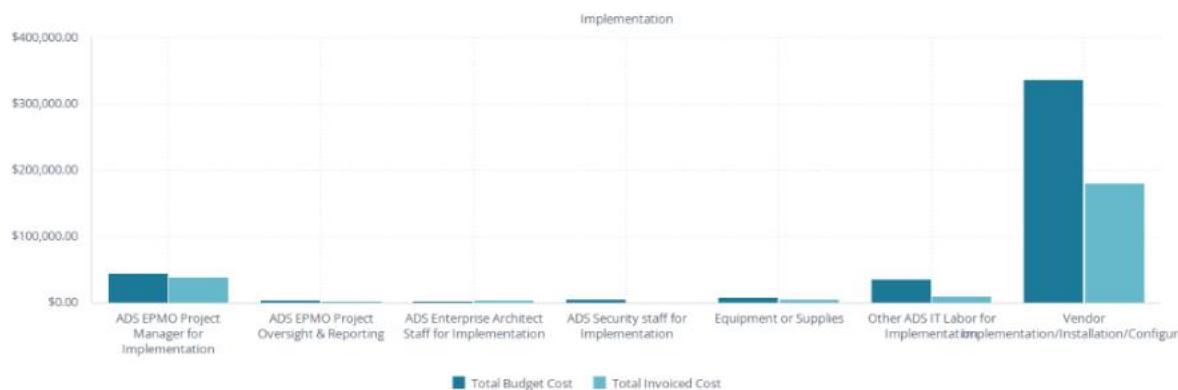
Schedule Estimates

| Estimate Name                                | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|--|-------------------------|--------------------|------------------|---|
| Baseline at Contract                         | Baseline at Contracting | 11/18/21           | 6/30/26          | Schedule end date changed and costs changed due to executed contract. |
| Initial Estimated Project Start-Finish Dates | Initial Estimate        | 11/18/21           | 12/31/24         | Schedule Based on Initial IT ABC                                      |

## LURB ACT Scanning Budget Summary

Scanning Actual Project Costs through December 2025

Budgeted vs Actual Invoiced Implementation Costs



|   |                                      |  |  |   |           |  |  |  |  |  |
|---|--------------------------------------|--|--|---|-----------|--|--|--|--|--|
| <b>Project Name</b>   | SAS - Case Management System (CMS)   |  |  |   |           |  |  |  |  |  |
| <b>Agency/Department</b>  | Other State's Attorneys and Sheriffs |  | <b>Current Project Phase</b>   |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>  | 11/1/2021                            | <b>Original Project Estimated End Date</b> | 6/30/2026  | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>  | 5/9/2024                             | <b>Current Estimated End Date</b>          | 6/30/2026  |   |           |  |  |  |  |  |
| <b>Project</b>  | <b>Status</b>                        |  | <b>Update</b>  |   |           |  |  |  |  |  |
| <b>Scope</b>  | ON TRACK                             |  | No amendments to the scope of the project have been requested or completed. Integration progress is underway with the Judiciary and DPS.   |   |           |  |  |  |  |  |
| <b>Schedule</b>   | ON TRACK                             |  | As a result of progress with the Judiciary/SAS integration, the project team has chosen late February/early March 2026 go-live time frame. There is nothing to indicate this milestone will not be reached.  |   |           |  |  |  |  |  |
| <b>Budget</b>   | MANAGEABLE RISKS                     |  | Costs are on track with the implementation vendor and project management consultant. It does not appear that there will be any additional cost for the integration between SAS and the Judiciary. Project teams from the Department of Public Safety (DPS), SAS, Crosswind, and Matrix are working to complete an SOW so that the cost of integration between DPS and SAS can be determined. |   |           |  |  |  |  |  |
| <b>Overall</b>  | ON TRACK                             |  |  |   |           |  |  |  |  |  |
| <b>Scope Summary</b>  |                                      |  |  |   |           |  |  |  |  |  |
| <p>The SAS Case Management System (CMS) Project is a transformative initiative that seeks to modernize and streamline case management processes for the State's Attorneys and Sheriffs Department in Vermont. By implementing a new CMS, the project aims to enhance efficiency, collaboration, and data integration by interfacing with the VT Judiciary Odyssey system and Valcor's Crosswinds. The project's primary objective is to implement a robust and user-friendly Case Management System that meets the specific needs of the SAS. This system will enable the SAS to efficiently manage their cases, track progress, and ensure timely resolution of legal matters. To ensure seamless integration and data sharing, the new CMS will interface with the VT Judiciary Odyssey system. This integration will enable the SAS to access relevant case information, court records, and updates directly from the judiciary system. This streamlined data exchange will enhance collaboration between the SAS and the judiciary, promoting efficiency and accuracy in case management. Additionally, the CMS will interface with Valcor's Crosswinds computer-aided dispatch/record management system. This integration will enable the SAS to access critical information related to law enforcement activities, such as incident reports, dispatch records, and other relevant data. This interface will facilitate seamless information sharing between the SAS and law enforcement agencies, enhancing coordination and efficiency in their operations. By implementing the SAS Case Management System, the project aims to improve data integration, streamline processes, and enhance collaboration between the SAS, the judiciary, and law enforcement agencies. The new CMS will provide a user friendly interface for case management, enabling SAS personnel to easily track and manage their cases, access relevant information, and generate reports. The SAS Case Management System (CMS) Project represents a significant step towards modernizing and improving case management processes for the State's Attorneys and Sheriffs Department in Vermont. By implementing a new CMS that interfaces with the VT Judiciary Odyssey</p> |                                      |  |  |   |           |  |  |  |  |  |

system and Valcor's Crosswinds, the project aims to enhance efficiency, collaboration, and data integration. This initiative reflects the commitment of the SAS to provide effective and efficient legal services and law enforcement support to the people of Vermont.

### Schedule Summary

This project is currently in execution and on schedule. The implementation vendor continues to make progress with configuration. Integrations with the state judiciary are on track to be operational at go-live. Go-live is currently scheduled for late February, early March 2026. Integrations with the Department of Public Safety (DPS) have seen recent progress, but there availability for go-live is uncertain at this time. The integration with DPS is not considered go-live critical.

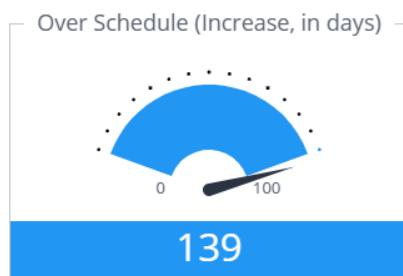
### Budget Summary

| Total Original Estimated Implementation Cost | Total Current Estimated Implementation Cost    | Budget Status – On Track, Over or Under Budget |
|--|--|--|
| \$704,409.00                                 | \$877,563.00                                   | OVER BUDGET                                    |
| Total Original Estimated Operating Cost      | Total Current Estimated State Operating Cost   | Budget Status – Over or Under Budget           |
| \$1,333,906.95                               | \$1,333,905.00                                 | ON TRACK                                       |
| Total Original Estimated IT Activity Cost    | Total Current Estimated State IT Activity Cost | Budget Status – Over or Under Budget           |
| \$2,038,315.95                               | \$2,211,468.00                                 | OVER BUDGET                                    |
| Solution Lifecycle Years                     | 5  |  |

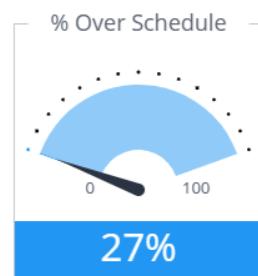
### Schedule Variance and Budget to Actuals Charts

#### SAS - Case Management System Schedule Variance

Initial Estimate to Current Baseline



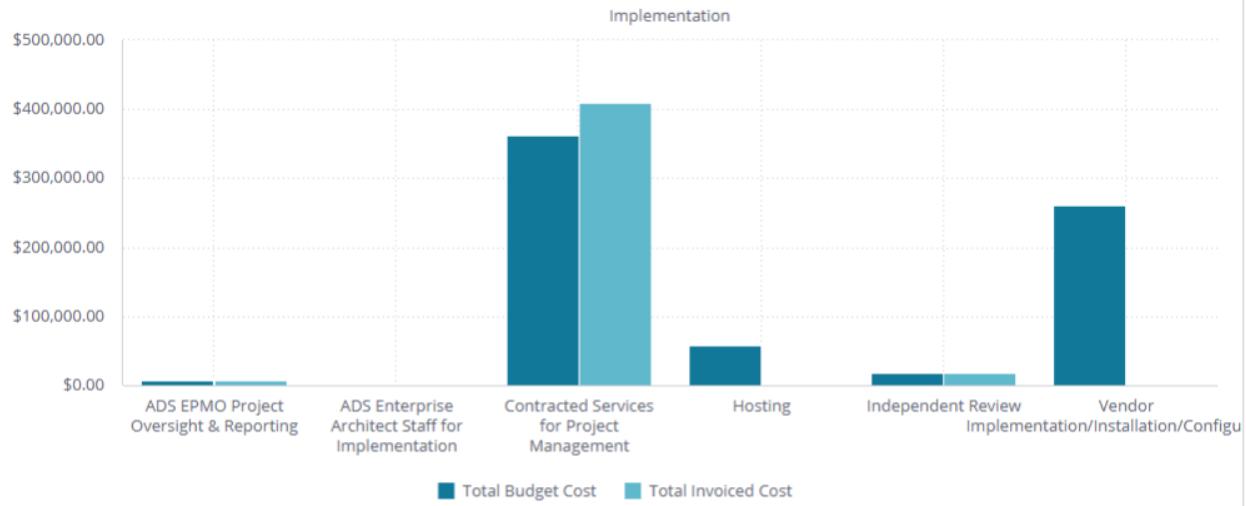
Initial Estimate to Current Baseline



## SAS - Case Management System Budget Summary

Actual Project Costs through September 2024

### Budgeted vs Actual Invoiced Implementation Costs



| IT ACTIVITY ANNUAL SUMMARY REPORT  |  |  |   |   |           |  |  |  |  |  |
|--|--|--|---|---|-----------|--|--|--|--|--|
| <b>Project Name</b>  | VCCB - Cannabis Control Board Application          |  |   |   |           |  |  |  |  |  |
| <b>Agency/Department</b>   | Other Vermont Cannabis Control Board               |  | <b>Current Project Phase</b>  |   | Execution |  |  |  |  |  |
| <b>Original Project Start Date</b>   | 11/15/2021   | <b>Original Project Estimated End Date</b> | 11/30/2025  | <b>Number of Change Orders Approved</b> | 0         |  |  |  |  |  |
| <b>Actual Start Date</b>   | 9/9/2022   | <b>Current Estimated End Date</b>          | 11/30/2025  |   |           |  |  |  |  |  |
| <b>Project</b>   | <b>Status</b>                                      |  | <b>Update</b>   |   |           |  |  |  |  |  |
| <b>Scope</b>   | <b>MANAGEABLE RISKS</b>                            |  | Phase 1 and 1A scope has been completed. Phase 2 scope, including, Enforcement, Appeals, and Medical, is on hold pending business decisions about items in the operations backlog. These decisions will affect the scope of Phase 2.                |   |           |  |  |  |  |  |
| <b>Schedule</b>  | <b>NEEDS LEADERSHIP INTERVENTION</b>               |  | Phases 1 and 1A are complete. Business decisions regarding the operations backlog will impact the Phase 2 requirements, sequence of work, and the timing of Phase2 .  |   |           |  |  |  |  |  |
| <b>Budget</b>  | <b>MANAGEABLE RISKS</b>                            |  | The original baseline budget for implementation was \$2,092,231.00. Additional scope, via new Statements of Work (SOWs) and SOW amendments, has increased implementation to \$3,297,097.00. The total project budget was updated to \$4,227,022.00. |   |           |  |  |  |  |  |
| <b>Overall</b>   | <b>NEEDS LEADERSHIP INTERVENTION</b>               |  |   |   |           |  |  |  |  |  |
| <b>Scope Summary</b>   |  |  |   |   |           |  |  |  |  |  |
| The Cannabis Control Board Application Implementation project is a key initiative to improve how cannabis licensing and regulation are managed in Vermont. This project aims to make the process more efficient, transparent, and compliant. It is divided into two phases: Phase 1 focuses on licensing, product registration, and inventory tracking, including the new Propagator License. Phase 2 will add features for managing medical cannabis programs, enforcement, appeals, and a public registry. The application will serve as a central platform for all stakeholders, streamlining workflows and improving communication. This project is committed to supporting the cannabis industry's growth by ensuring regulatory processes are up-to-date and effective, adapting to legislative changes and industry need. |  |  |   |   |           |  |  |  |  |  |
| <b>Schedule Summary</b>  |  |  |   |   |           |  |  |  |  |  |
| Phase 1 (Licensing) was completed in early 2023, and Phase 1A (Product Registration and Inventory Tracking) was completed in early 2025. Phase 2 (Medical Cannabis, Enforcement, Appeals, and a Public Registry) is currently on hold pending business decisions on the operations backlog. These decisions will affect the scope and timing of Phase 2.   |  |  |   |   |           |  |  |  |  |  |
| <b>Budget Summary</b>  |  |  |   |   |           |  |  |  |  |  |
| <b>Total Original Estimated Implementation Cost</b>  | <b>Total Current Estimated Implementation Cost</b> |  | <b>Budget Status – On Track, Over or Under Budget</b>   |   |           |  |  |  |  |  |

|  |   |   |
|--|---|---|
| \$1,463,335.00                                   | \$2,030,337.20  | OVER BUDGET                                 |
| <b>Total Original Estimated Operating Cost</b>   | <b>Total Current Estimated State Operating Cost</b>   | <b>Budget Status – Over or Under Budget</b> |
| \$1,331,375.00                                   | \$264,535.00  | ON TRACK                                    |
| <b>Total Original Estimated IT Activity Cost</b> | <b>Total Current Estimated State IT Activity Cost</b> | <b>Budget Status – Over or Under Budget</b> |
| \$2,794,710.00                                   | \$2,294,872.20  | UNDER BUDGET                                |
| <b>Solution Lifecycle Years</b>                  | 5   |   |

## Schedule Variance and Budget to Actuals Charts

### VCCB Cannabis Control Application Schedule Variance

Initial Estimate to Current Baseline

Initial Estimate to Current Baseline



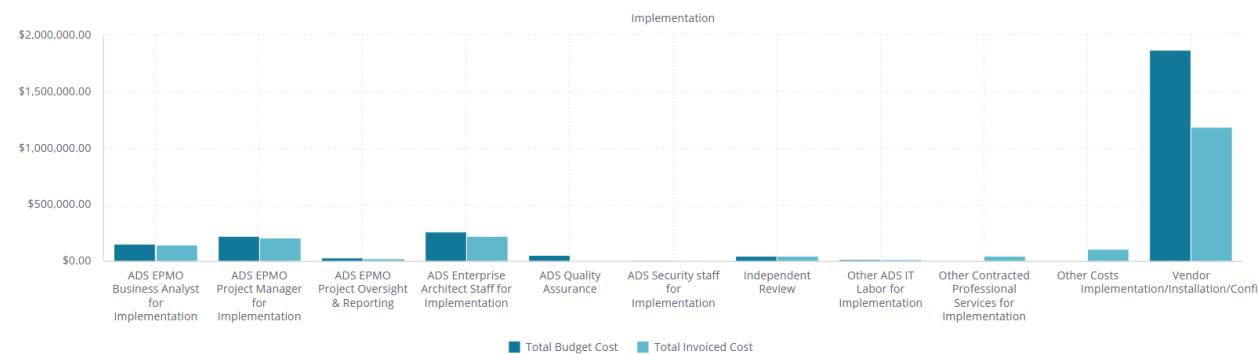
#### Schedule Estimates

| Estimate Name           | Estimate Stage          | Project Start Date | Project End Date | Change Narrative  |
|-------------------------|-------------------------|--------------------|------------------|---|
| Baseline at Contracting | Baseline at Contracting | 11/15/21           | 1/2/23           | MTX   |
| Revised                 | Baseline 8              | 11/15/21           | 6/28/24          | Phase 1A  |
| Revised Estimate        | Baseline 2              | 11/15/21           | 11/2/22          | TechM   |
|                         | Baseline 3              | 11/15/21           | 3/31/26          | Phase 2 timeline is unknown due to business decisions needed on the operations backlog. |

## Annual Report Budget Summary

Actual Project Costs through November 2025

Budgeted vs Actual Invoiced Implementation Costs





The graphic is a grid-based layout for the Strategic Plan. It features four main columns, each with a vertical bar on the left labeled 'STRATEGY' and a title at the top.

- VISION:** To provide government services that are secure and easily accessible to all people doing business and interacting with the State of Vermont.
- Mission:** To collaborate with our partners in state government to deliver simple and intuitive technology solutions that improve the lives of Vermonters.
- USER EXPERIENCE:**
  - Increase the number of simple, low-cost, online interactions that Vermonters have with their government.
  - Build a closer online relationship with Vermonters, including single sign-on capability
  - Improve Vermonter's experience with state government by transitioning outdated paper processes with online, streamlined services.
- PREDICTABILITY AND TRANSPARENCY:**
  - Proactively reduce the number of applications through consolidation and elimination. This will result in lower IT maintenance costs, purchasing costs, licensing costs, and employee costs over the life cycle.
  - Improve the 5-year IT roadmap and investment plans for all agencies aligned to the ongoing modernization of government
  - Utilize improved standards to provide timely and accurate budget and expenditure information to IT decision-makers.
  - Continue focus on investment and services in cybersecurity and core enterprise services

**Strategic Pillars:**

- SIMPLIFYING TO REDUCE COMPLEXITY**
  - Strengthen our digital foundation by replacing legacy IT systems with integrated preferred enterprise platforms, thereby reducing technical debt.
  - Deploying new systems by utilizing cloud-based offerings to reduce our infrastructure footprint and total cost of ownership.
  - Enable AI responsibly and securely while maintaining the highest standards
- ENHANCING STANDARDS**
  - Raise employee and Vermonter awareness of cyber risk and data privacy through training and reporting
  - Coordinate cybersecurity policies and practices throughout State Government
  - Improve data-driven decision making related to public health and safety through the development of robust data analytics, governance, and management systems
  - Establishment of Core Enterprise Services as the foundation available to every user, agency, and department in state government.
- BREAKTHROUGH INDICATORS**
  - 5 existing infrastructure-based systems migrated from OnPrem to Cloud Managed Services.
  - Replacement of 30 legacy applications with State-preferred enterprise platforms.
- BREAKTHROUGH INDICATORS**
  - 90% completion of Cyber-awareness training quarterly by state employees
  - Application and data risk evaluations integrated into the 12 cabinet-level IT investment plans by 2025
  - 12 cabinet-level agencies and departments with technology risk evaluation report cards by 2024
  - Standard Service model of IT support of all Core Enterprise Services delivered by 2024
  - 5 data sets available for analysis in the new data environment by 2024
  - All Dashboards and analytics available through PowerBI by 2024

**For More Information**  
See the ADS website at <http://digitalservices.vermont.gov/>



See the EPMO website at <http://digitalservices.epmo.vermont.gov/>

General project inquiries should email [ads-epmo@vermont.gov](mailto:ads-epmo@vermont.gov)

EPMO Director: [Stacy.Gibson-Grandfield@vermont.gov](mailto:Stacy.Gibson-Grandfield@vermont.gov)