

DEPARTMENT OF TRUST LANDS INFORMATION TECHNOLOGY SYSTEMS REPLACEMENT PROGRAM ITERATIVE STARTUP AND CLOSEOUT REPORT

Submitted to Project Oversight on 06/25/2025

GENERAL INFORMATION

Program Name: Information Technology Systems Replacement Program (ITSR)

Project Names: Unclaimed Property Replacement, Financial Management Accounting, Land Management System-Surface, Land Management System-Minerals and Land Management System Enhancements

Agency Name: North Dakota Department of Trust Lands (DTL)

Program Sponsor: Joe Heringer

Project Sponsors: Susan Dollinger, Peggy Gudvangen and Catelin Newell

Program/Project Manager: Aaron Kielhack

PROGRAM DESCRIPTION

In 1889, the brand-new State of North Dakota, through an act of Congress called The Enabling Act, received a gift of over 3 million acres of land from the Federal Government for funding public education in the State to perpetuity. Typically, that transfer included Sections 16 and 36 in every North Dakota township. To manage the assets, Article IX of the North Dakota Constitution created the Board of University and School Lands, more commonly referred to as the Land Board. The Land Board is comprised of the Governor, Secretary of State, Attorney General, State Treasurer, and Superintendent of Public Instruction.

In 2016 the State of North Dakota Office of the State Auditor conducted an audit of North Dakota Department of Trust Lands (DTL) that identified the need for new IT systems and supporting processes. DTL decided to conduct a Business Process Modeling project with Major Oak Consulting, (now part of Verint), in the second half of 2016, which reconfirmed the findings of the State Auditor. As a result, the Information Technology Systems Replacement (ITSR) program was created. Three distinct projects will comprise the ITSR program: Unclaimed Property Replacement (UPR) project; the Financial Management & Accounting (FMA) project; and the Land Management System (LMS) project.

DTL conducted a procurement process for UPR in accordance with State laws and signed a contract with Kelmar Associates, LLC on July 12, 2018. The UPR project will include planning, analysis, along with the configuration of the KAPS system, a Software as a Service (SaaS) product as well as any environments, data conversions-migrations, interfaces, testing, training, and full production deployment. As of July 25, 2018, the Planning and Analysis phase of the UPR project began. In January 2018, the Execution phase consisting of design, conversion, configuration, testing, training, and deployment phase began and is expected to be completed by April 29, 2019. The new UPR system went live in production on 04/29/2019 as scheduled.

DTL began a procurement process for FMA in Q3 2018 with the assistance of Verint. The Request for Proposals (RFP) were sent out in October 2018. The procurement included a Proof of Concept (POC) for the new system. In Q1 2020, the procurement for the FMA project was completed and Ernst & Young, LLC (EY) was hired to implement the Microsoft Dynamics 365 Finance module under a North Dakota Information Technology (NDIT) professional services contract. Planning for the FMA project was completed in Q1 2020 and the project is now in Execution. The FMA project will take an iterative approach in implementing the new system. Due to COVID-19 restrictions (remote work for the project team, no travel by EY), the original go-live date of June 1, 2020, was rescheduled to July 1, 2020. FMA went live in production on July 1, 2020, as scheduled. A support and maintenance contract amendment for EY to provide technical support for FMA for the next four years was also approved. The FMA project is now closed.

In Q2 2019, DTL started on a procurement for LMS, with the assistance of Verint. Throughout the remainder of 2019, DTL worked closely with OMB, NDIT and Verint to create a Request for Proposals (RFP) documentation and conducted a procurement in 2020. Ernst & Young, LLC (EY) was hired to implement Microsoft Dynamics 365 Customer Engagement in October 2020 and the project will start with implementing functionality for Surface Management. The LMS Surface project kickoff occurred on October 14, 2020, and the Execution phase is now underway with the expectation of finishing in Q3

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2021. DTL received additional funding for the LMS Minerals project during the 2021 North Dakota Legislative session. Work on the LMS Surface project continued through Q3 2021 and went live in production at the beginning of Q1 2022 after several change requests added more scope to the project. The LMS Surface project is now in the Closeout phase, which will be completed in Q2 2022. Planning and Discovery (Analysis) for the LMS Minerals project began and was completed within Q3 2021. Configuration and Development for the LMS Minerals project began in Q2 2022. The LMS Minerals project was completed in Q2 2023.

DTL received additional funding of \$4,900,000 during the 2023 Legislative Session (HB1013) for enhancements to FMA and LMS including the following, Portal enhancements, Online Payment Processing, Multiple Leases per Application and Invoice Streamlining that will be part of the new Land Management System Enhancements (LMSE) project during the 2023-2025 Biennium. The LMSE project went live in April and May 2025, and the project closed out in June 2025. As a result, the Information Technology Systems Replacement (ITSR) program was completed and closed out.

BUSINESS NEEDS AND PROBLEMS

DTL's information technology (IT) systems developed in the late 1980s and early 1990s for unclaimed property, financial management and the integrated land management have reached their limits in terms of both development and support. DTL plans to procure systems that will meet the unclaimed property, integrated land management and accounting needs of the department.

PROGRAM FORMAT

Program Start Date: 04/26/2017

Budget Allocation at Time of Initial Start Date: \$3,600,000 (Special Funds)

How Many Projects Expected at Time of Initial Start Date: Three projects – UPR, FMA and LMS

Estimated End Date for All Projects Known at Time of Initial Start Date: 06/30/2023

PROGRAM ROAD MAP

The program road map shows the high-level plan or vision for the program's projects. It is intended to offer a picture of the lifespan of all the effort that is expected to be required to achieve the business objectives.

Project	Title	Scope Statement	Estimated Duration (months)	Estimated Budget
UPR	Unclaimed Property Replacement System	Replacement of the existing unclaimed property system with the KAPS system from Kelmar Associates	9 Months	\$320,229
FMA-Support	Procurement Support	Verint support for the FMA procurement	6 Months	\$103,515
FMA-Support	Financial Management & Accounting	Verint support for the FMA Proof of Concept (POC) for the FMA procurement	3 Months	\$11,825

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FMA	Financial Management & Accounting System	Replacement of the existing financial management and accounting system with Microsoft Dynamics 365 Finance & Operations module	8 Months	\$500,000+
LMS-Support	Land Management System	Verint support for the LMS procurement	6 Months	\$70,755
LMS-Support 2	Land Management System	Croswell-Schulte Consulting support for the evaluation-scoring portion of the LMS procurement	3 Months	\$38,025
LMS	Land Management System	Replacement of the existing asset, trust, and land management system	18 months	\$2,000,000+
LMSE	Land Management System Enhancements	Enhancements to both FMA and LMS including Portal enhancements, Online Payment Processing, Multiple Leases per Application and Invoice Streamlining	14 months	\$4,900,000

Notes:

PROJECTS BASELINES

The baselines below are entered for only those projects that have been planned. At the completion of a project or phase a new planning effort will occur to baseline the next project/phase and any known actual finish dates and costs for completed projects/phases will be recorded. The startup report will be submitted again with the new information.

Project	Project Start Date	Baseline Execution Start Date	Baseline End Date	Baseline Budget	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
UPR	05/31/2017	01/03/2019	05/03/2019	\$273,700	05/03/2019	0%	\$205,987	24.7% Under
FMA	08/16/2018	01/08/2020	11/04/2020	\$1,849,455	08/24/2020	31% Ahead	\$1,665,568	9.9% Under
LMS-Surface	05/22/2019	10/14/2020	02/3/2022	\$1,815,231	02/03/2022	0%	\$1,815,231	0%
LMS - Minerals	09/20/2021	02/07/2022	06/22/2023	\$2,293,067	06/08/2023	2.2% Ahead	\$2,125,466	7.3% Under
LMSE	11/14/2023	04/11/2024	05/19/2025	\$4,900,000	05/23/2025	1% Behind	\$3,851,123.5	19.3% Under

Notes:

Project start dates are the beginning of the planning/procurement phases based on the signing of the project charter documents.

The 19.3% budget variance for the LMSE project was due to travel, risk contingency, management reserve funds not being utilized along with less project management hours used than originally planned.

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OBJECTIVES FOR THE PROJECTS

Project	Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
UPR	Replace existing front end and back-office systems for unclaimed property including data/images	<ul style="list-style-type: none"> Full online system Data conversion of legacy data and images New reports Minimal staff interaction with online users 	Met	<ul style="list-style-type: none"> All deliverables were met and delivered as scheduled. Claims and holders being processed through KAPS system. Transitioned from project to support team
FMA	Replace existing systems for financial management and accounting for the LM and UPR systems	<ul style="list-style-type: none"> Retirement of existing Access DB and spreadsheets All FMA occurs in new system. Ability to interact with LM and UPR as required 	Met	<ul style="list-style-type: none"> All deliverables were met and delivered as scheduled. Retired legacy system Final integration with LMS will happen as part of the LMS project.
LMS-Surface	Replace existing system for Surface Management activities	<ul style="list-style-type: none"> Retirement of existing Access DB, Legacy SQL Server DB and Surf applications Integration with FMA Set up system foundation for Minerals 	Met	<ul style="list-style-type: none"> All Surface deliverables were met and delivered as scheduled. 100% of Surface activities, by both public and state users occur in new LMS. 100% of foundation for Minerals completed – related to LMS Minerals project.
LMS - Minerals	Replace existing system for Minerals Management activities	<ul style="list-style-type: none"> Retirement of existing Access DB, Legacy SQL Server DB and Minerals front end applications Integration with FMA 	Met	<ul style="list-style-type: none"> All Minerals deliverables were met and delivered as scheduled. 100% of Minerals activities by both public and state users occur in new LMS. 100% of foundation for Minerals completed – related to LMS Minerals project.
LMSE	Payment Optimization with online payments including credit cards. Online portal updates to enhance the customer	<ul style="list-style-type: none"> Payment process reduced to an hour or less. Updates to make the online portal web pages and navigation more intuitive 	Met Met-In progress	<ul style="list-style-type: none"> Payment processing time has been reduced as expected after some defects in production were fixed during one of the hotfix deployments.

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	experience by making the web pages and site navigation more intuitive for filing applications.	<ul style="list-style-type: none"> • The enhanced integration between FMA and LMS allows for the processing of all applications with multiple leases immediately after the go live. • Elimination of at least one of the five party/divisions' involvement in processing invoices in FMA and LMS immediately after the go live. • 1,000+ (estimated) person hours saved through the automation of processing and updating invoices one year after the go live of the project. 	Met	<ul style="list-style-type: none"> • DTL will continue to monitor the usage of the updated online portal and decrease staff interaction throughout the remainder of 2025 and for the lifetime of LMS. • Multiple leases per application have occurred in production. • n/a
	Enhance the integration between FMA and LMS to allow multiple leases per application.		No longer relevant	
	Reduce the number of DTL divisions that are required for invoice processing in both FMA and LMS.		Met – In Progress	

POST-IMPLEMENTATION REPORTS

Post-Implementation Reports are to be performed after each project is completed. A “PIR” is a process that utilizes surveys and meetings to determine what happened in the project/phase and identifies actions for improvement going forward. Typical PIR findings include, “What did we do well?” “What did we learn?” “What should we do differently next time?”

Project	Lesson learned, success story, idea for next time, etc.
UPR	<p>Success Stories:</p> <ol style="list-style-type: none"> 1. Kelmar very prompt on fixing things when issues arose during the project 2. Excellent work ethic 3. Appreciated all the SMEs - questions went to the right people - level of communication was good 4. Team small size at DTL was challenging to deal with while the project was ongoing 5. A lot of manual work replaced by KAPS 6. Easy to work with when compared to other states - very flexible 7. PM had to step in (replaced the previous PM) - was his first go live and same thing with Andrew 8. Training - state people were well prepared and ready 9. Andrew will be busy in the near future- more training and reporting (financials) 10. Reporting approach - working with Tim - Peggy liked the list of reports - very useful 11. (2nd state to use that reporting approach) 12. Documentation is good - like the step-by-step process (continuous improvements) 13. Support team will help with the reporting - spend a lot of time there 14. State Website - (3rd party) - Faced paced - lots of communications - very fast - we held them up if anything 15. Go Live was painless - no problems 16. Catelin usually handles all the support issues for imaging and Andrew

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	<p>17. There is a ticketing system - easy for DTL to use</p> <p>Lessons learned:</p> <ol style="list-style-type: none"> 1. The biggest stumbling block was the issue with JetPay and the \$10K block (there is workaround). 2. OnBase - still have some wrinkles to work out with the images - still waiting for some that should be there already - Andrew is aware. 3. Training -- maybe more for the front office/desk people – identify all stakeholders earlier.
FMA	<p>Success Stories:</p> <ol style="list-style-type: none"> 1. Legacy accounting system replaced by modern, upgradable low-code system based on Finance & Operations Dynamics 365 module. 2. Resolved business problem of having to rely on an accounting system that could have crashed at any time. 3. One on one training and testing sessions worked well for the project team. 4. Project team worked around the month end financial activities with minimal impact to the project schedule. 5. The project team was able to adjust to the travel ban for EY and the work from home order for DTL and NDIT caused by the COVID-19 crisis and tested, trained and deployed the new FMA system remotely as opposed to being onsite, which is the standard procedure. <p>Lessons Learned:</p> <ol style="list-style-type: none"> 1. User manuals were challenging to create and use. 2. User Acceptance Testing data was unfamiliar and confusing to use. 3. Workshop sessions were not always well prepared. 4. Scheduling was a challenge with a small group (Finance). 5. Timing was a challenge – small department – month end issues. 6. Project team didn't always understand the challenges and constraints faced by government agencies. 7. Hypercare phase will be extended until December 31, 2020, to ensure support from EY project team members as monthly, quarterly, and yearly processes take place for the first time in FMA.
LMS	<p>Success Stories:</p> <ol style="list-style-type: none"> 1. Auto formatting for all surface lease advertisements, previously a manual task. 2. FileNet uploads for leases are now available through LMS. 3. Processing cost shares on water development is a lot easier now in the new system. 4. Ease of navigation in the system – multiple connections, send out links – a lot more information available at your fingertips. 5. Layout and general look of the records is user friendly. 6. Users have more power in LMS as opposed to the old system – no longer need IT (both DTL and NDIT) - bulk or mass uploads can be done by users. 7. Audit history now exists – huge win – didn't have that information in the old system – can see changed data. 8. The approvals are now available. 9. Business process flow – dashboards – can see everything all at once instead of having to run a query in the old system. 10. Data cleanup is easier now, used to take weeks. 11. Soils data on a track level is another big efficiency – used to take months to revise a county's soil numbers – takes less than a week.

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	<ol style="list-style-type: none"> 12. Timeline – everyone can see what's going on 13. Attaching emails is easy – easy is good, everyone does it then 14. Taxes are simpler to do now as well in the new system 15. Global search is much appreciated in the new system – everything is linked together in the new system. 16. Configuration settings another big win – easily change some of the calculations on their own (no IT). 17. Ability to update look-up tables without IT support. 18. Anna Ploszynski from EY was top notch throughout the project – she always had the best interests of both the project and agency in mind. She took the time to understand the business needs way more than anyone else – if we continue to do work with the same vendor, then we want her assigned to the projects. 19. Azure DevOps was used to communicate updates and changes, approvals for the user stories – good to use a central location for functionality, errors, and other items 20. Go Live had minimal issues and errors as compared to the Surface go live for LMS 21. Surface, Minerals and Revenue Compliance are now all working the same system- first time ever! Everyone can see and use the same data now 22. Royalty reports are being uploaded into the new portal now by operators 23. Minerals division was able to take ownership of the user stories throughout the project, especially during user acceptance testing 24. Acceptance testing was more effective for Minerals as it focused on the processes and not just blocks of user stories 25. The long sessions for reviews and testing, while long and staff numbers were limited, those sessions did help the team focus on specific areas of the system – lots of collaboration between Minerals and Anna. <p>Lessons Learned:</p> <ol style="list-style-type: none"> 1. Include as many people as possible during demos of new systems and products. 2. Agencies need to broaden the knowledge base at least from a business perspective of their existing systems. 3. Review definitions of specific wording throughout the project. 4. Provide firmer guidelines as to which parts of the system are ready for testing or how far a process can go when the system isn't fully configured – iteration approach. 5. More onsite reviews if possible 6. Make sure that hardware can handle the new systems – may require getting updated hardware. 7. Make sure that hardware can handle the new systems – may require getting updated hardware. 8. Lengthen the testing phase, especially for users who are not experienced testers. 9. Regression testing- more of it needed 10. Full reviews/walk throughs of how things work 11. More in-depth analysis of how things work at the agency are needed during the Discovery phase. 12. Agency staff still must do their day jobs even while working on a project – recommend increasing durations in schedules – explain time limitations in RFP. 13. Need to gain a more thorough knowledge of a legacy system prior to working on the actual implementation – longer discovery and analysis time 14. Bridge the gap between business knowledge and functionality is still an issue – discovery should include more “ride-a longs” between business and IT (vendor)
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	<p>15. More effective management changes are needed, especially with training</p> <p>16. Include the interfaces in discovery and design as soon as possible – early and often</p> <p>17. Avoid having applications/systems in existence for too long before replacing them – more frequent upgrades and/or reviews of data</p>
LMSE	<p>Success Stories:</p> <ol style="list-style-type: none"> 1) More centralized work/area(s). Less time spent on bulk notifications to external contacts. Less copy & paste. Easier visibility into data. Greater ability to connect records. Greater ability to capture, display, and utilize data. 2) Use of the portal by customers should be a win for processing applications, assignments, royalty reports etc. 3) The Project Sponsor did an excellent job of representing the needs of the Department & individual team members to coordinate with EY and keep the project on track. 4) For areas of LMS which are frequently worked in, problems were hammered out and it's impressive how much capability it brings for team members. Significant clean-up & refinement remains but it should provide a good platform. 5) The portal redesign provided us with a much more user-friendly and modern website than we had on the previous portal and our legacy public web forms. This not only benefits us in the present but sets us up nicely for further improvements and additional functionality on our public web apps. 6) Allowing users to pay their application fees and invoices through the online portal. 7) Several DTL staff identified and communicated business needs; analyzed and collaborated with each other to propose design solutions; and reviewed, tested, retested, and provided feedback on contractor work. 8) The customer portal allows all our customers, whether they be surface, minerals or royalty, to access their records online. They get to see progress of their applications without having to contact the Department, waiting for business hours. 9) The portal is much more aesthetically pleasing now that it is fully customized. It is user friendly. We offer plenty of functionality without having to log in, helping make our records transparent. 10) For the first time in Trust Land's history, we can accept credit card payments. 11) We will never have everything perfect by individuals' standards, but wow have we accomplished a lot over the years. The team should be proud of that. <p>Lessons Learned:</p> <ol style="list-style-type: none"> 1) Probably should have had a deeper dive into existing connections like FileNet and how other new integrations (such as mapping and offline inspections with GPS/ pictures) would ideally work and what ND integration requirements there are prior to developing the RFP. Always ask more questions. 2) Developing a system is difficult, you will not know right away what you want/need. 3) To clean up/ get what you want will take significant input and effort by employees. 4) For custom development systems, employees need to be engaged to get what they want, if they aren't engaged, they will not get what they want. 5) Our organization is very complex & one drawback of highly specialized, custom solutions is that they are rigid, inflexible, and require an exact understanding of what a workflow is going to look like. 6) They are not well suited to situations where inputs & outcomes cannot always be pre-determined or may change down the road. 7) Small staff size creates challenges by making each department highly compartmentalized and placing a large amount of weight on each individual employee's tech savviness.

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	<p>8) The importance of cohesion, workflows, and being able to consider whether each design challenge requires a flexible or rigid solution.</p> <p>9) Each situation requires a different tool and it's necessary to understand whether you need a padlock or a bank vault; before building accordingly.</p> <p>10) This gave us the opportunity to better define our internal procedures and requirements so that we were able to implement the potential of public self-service as a part of them.</p> <p>11) Regularly scheduled UAT sessions during each of the UAT periods were a huge help. We found that it allowed the teams to respond to feedback quickly, and helped reduce any confusion during testing and speed up the testing process.</p> <p>12) It is always difficult having vendor team members change during a project. Some personalities work much better with the staff than others. Finding that balance, having the learning curve for new team members, all takes time/effort. We have been with some team members for 9 years from the initial RFP through today.</p> <p>13) Data clean up, data clean up, clean up clean up, and data clean up! You pay dearly, financially and workload wise, when you allow for bad data to fill your new systems. I do think that if another agency is willing to start a project fresh, only loading critical data and not all historical data, permanent or not, you would be in a better place. Records management/data clean up doesn't typically rise to the top of a list in a normal workday. Focus on that helps, greatly. Outline co-dev, if you have capable internal staff, in your RFP/SOW.</p> <p>14) A major challenge we faced in testing was a mismatch between tech design and wireframes on the Portal user stories. We should identify a better way of working through wireframe design approvals and ensure that tech details match the final wireframe design, and any changes made during development or testing are reflected in new user stories, with new wireframes if needed. One way to accomplish this would be to have wireframes approved first, before tech design.</p> <p>15) Due to the complexity of the project, I think at some point that EY fell short of providing technical design insight which was necessary to anticipate and avoid falling into problems. A significant expense was encountered by having to redesign areas which were initially inadequate for meeting project requirements. Responsibility also falls to DTL team members as we might have pushed for an overly detailed solution, but the vendor needs to provide oversight, insight, direction, and accountability to keep the project on track.</p> <p>16) Work to set an expectation that the project will not be perfect right away and that updates will be made to improve the system. Try to keep the same developers working on the project for the entirety of the project.</p> <p>17) It is not a completely mutually beneficial relationship at its core, the vendor desires to deliver a working product, but, ultimately, it is a business. It can be frustrating at times when we are close on the design but need tweaking and out comes the change requests/\$\$\$\$. Is the charge for the dev efforts worth the frustration for team members? I don't believe it is every time. With that being said, the vendor is not the enemy. There are times when internal staff contradict themselves as well.</p> <p>18) The lesson learned every time is the more detail in the request, the better. Assuming never works. My analogy - I want to be rich. I get turned into a piece of chocolate cake. Then I pay to restore myself. Then I pay again rephrasing I want to be rich, financially. Then I become rich at 3rd world level. Then I pay again rephrasing, I want to be rich, by American standards, financially.</p>
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COST BENEFIT ANALYSIS

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- Improved and more efficient business processes:
 - Front-end scanning business processes and validation
 - Performance measurement tools
 - Reporting capabilities (UPR)
 - Online services for holders and claimants (UPR)
 - Improved data and images quality (UPR)
 - Utilization of progress dashboard enabling supervisors to track workflow progress (UPR)
 - Finance and accounting system build on modern low-no code cloud-based platform (FMA)
 - Ability to access finance and accounting system remotely (FMA)
 - FMA will be able to integrate with the new LMS.
 - LMS will contain both Surface and Minerals information in one system.
 - All new systems will be hosted on Cloud Computing platforms.
 - Customers will be able to pay their invoices by using the updated online portal.
- Technology benefits
 - Retirement of unsupported unclaimed property system (UPR)
 - Vendor hosted system with minimal overhead and less staff (part-time and full-time) needed by DTL (UPR)
 - Vendor will support the new finance and accounting system along with Microsoft and the State (FMA)
 - Vendor will support the new land management system along with Microsoft and the State (LMS and LMSE)
 - Systems will no longer run the risk of being obsolete.

REGULAR SOFTWARE UPDATES OF SYSTEM INCLUDING NEW BUSINESS FUNCTIONALITY AND TECHNOLOGICAL ENHANCEMENTS KEY CONSTRAINTS AND/OR RISKS

- DTL resources for all its divisions are constrained due to daily workloads including field work and Legislative Sessions (all projects)
- Limited availability due to month end accounting activities for FMA project resources (DTL)
- Limited availability of FMA project resources (DTL) due to biennium budget preparations for DTL and other state agencies in 2021
- The LMSE project must be completed by 06/30/2025 when the spending authority for this project will expire.