Maximus and Genesys contracted Market Connections to design and implement a study regarding cloud services and FedRAMP-authorized solutions.

**Research Objective**

**METHODOLOGY**

- From August 25 to September 15, 2020, 200 federal and 300 state and local government IT and business decision makers from agencies with direct citizen services participated in a blind online survey that averaged eight minutes in length.

- Throughout the report, notable significant differences are reported using a gold circle.

- Due to rounding, graphs may not add up to 100%.
Respondent Classifications
Which of the following best describes the type of organization you work for?

- Federal civilian or independent government agency
- Department of Defense or military service

Per quotas that were set, nearly all federal respondents work for a federal civilian agency.
A variety of federal civilian agencies are represented, with the most representation from VA, DHS, DOJ, and HHS.
Which of the following best describes the type of organization you work for?

In which government department or agency do you work?

State and Local Agencies Represented

Of the state and local respondents, approximately half work for state government and half work for local government. Most work for the Department of Transportation, Health, Labor/Unemployment or Taxation/Revenue.
State and Local Populations

All state government respondents work for a state with a population of 500,000 or more, while all local government respondents work for a county or city with a population of 250,000 or more.

What is the estimated population of the ["STATE", "COUNTY" OR "CITY"] that you work for?
Involvement with Citizen Services and IT Firm Selection

All respondents are involved with programs and services that have direct interaction with citizens/constituents/customers and are involved in the selection of firms that provide IT solutions and services that help their organization achieve its mission.

Level of Involvement in Programs and Services That Have Direct Interaction With Citizens

- Very involved
  - Federal: 64%
  - State and Local: 51%

- Somewhat involved
  - Federal: 36%
  - State and Local: 49%

Involvement in Selection of IT Firms

- On a team that makes decisions
  - Federal: 70%
  - State and Local: 67%

- Evaluate or recommend firms
  - Federal: 58%
  - State and Local: 69%

- Develop requirements
  - Federal: 26%
  - State and Local: 47%

- Make the final decision
  - Federal: 37%
  - State and Local: 44%

- Other involvement
  - Federal: 3%
  - State and Local: 0%

Note: Multiple responses allowed.

For your organization, how would you describe your level of involvement in programs and services that have direct interaction with citizens/constituents/customers? (select all that apply)

In which of the following ways are you involved in the selection of firms that provide information technology (IT) solutions and services that help your organization achieve its mission? (select all that apply)
A variety of job roles are represented, with information technology (IT) reported most often.

Example Job Titles Include:
- CIO
- CTO
- Contract Specialist
- IT Manager
- IT Specialist
- Management Analyst
- Program Manager
- Systems Administrator

Which of the following best describes your role in your organization?
What is your current job title? (open end)
Survey Findings
Both federal and state and local respondents most often report their agency’s current timeframe for modernizing all IT systems in its enterprise is 19-24 months from now. Significantly more state and local respondents will be fully modernized within the next 6 months, while more federal respondents will modernize all IT systems more than 36 months from now.

What is your agency’s current timeframe for modernizing all IT systems in its enterprise?

- Have completed IT modernization: 6% Federal, 7% State and Local
- Within the next 6 months: 11% Federal, 20% State and Local
- 6-18 months from now: 19% Federal, 21% State and Local
- 19-24 months from now: 23% Federal, 22% State and Local
- 25-36 months from now: 14% Federal, 18% State and Local
- More than 36 months from now: 15% Federal, 18% State and Local
- No timeline for IT modernization: 8% Federal, 11% State and Local
- Don’t know: 4% Federal, 11% State and Local

* = statistically significant difference
The majority of federal respondents report some of their agency’s systems and solutions are in the cloud but not all, while state and local respondents most often report most systems and solutions are in the cloud. Significantly more state and larger county/city than smaller county/city respondents are likely to have all systems and solutions in the cloud.
Cloud Service Deployments Considered

Both federal and state and local respondents indicate their agency is most likely to consider using a government-only community cloud. Significantly more state and local respondents, driven by smaller counties/cities, would consider a public cloud.

Note: Larger counties/cities are defined as populations of 1 million or more. Smaller counties/cities are defined as populations of 250,000-999,999.

Note: Multiple responses allowed.
Familiarity with FedRAMP

Federal respondents most often report they know a little about FedRAMP, while state and local respondents most often report they know quite a bit.
Which of the following statements best describes the types of cloud services your agency considers using?

- Considers all cloud services regardless of FedRAMP authorization: 4% Federal, 19% State and Local
- Only considers cloud services that are FedRAMP authorized: 37% Federal, 34% State and Local
- Prefers to use FedRAMP authorized cloud services, but will occasionally consider other cloud services: 42% Federal, 45% State and Local
- Don’t know: 4% Federal, 2% State and Local

Both federal and state and local respondents most often report their agency prefers to use FedRAMP-authorized cloud services but will occasionally consider other cloud services.
Impact Level of FedRAMP-Authorization

Over half of both federal and state and local respondents indicate a moderate impact level is important to their agency for a cloud service provider to have. Significantly more state and local respondents indicate a low impact level is important.
To a significantly larger extent, federal respondents most often report their agency is actively using a FedRAMP-authorized solution. State and local respondents most often report they are in the process of implementing a FedRAMP-authorized solution.

Adoption of FedRAMP-Authorized Solutions

To what extent have FedRAMP authorized solutions been adopted in your agency?

- Actively using a FedRAMP authorized solution(s): Federal - 21%, State and Local - 29%
- In the process of implementing a FedRAMP authorized solution(s): Federal - 23%, State and Local - 31%
- Planning to use a FedRAMP authorized solution(s) in the next 12 months: Federal - 18%, State and Local - 25%
- Researching/Considering a FedRAMP authorized solution(s), but no plan: Federal - 18%, State and Local - 16%
- Not currently considering a FedRAMP authorized solution(s): Federal - 5%, State and Local - 4%
- Don't know: Federal - 6%, State and Local - 3%

= statistically significant difference
Waiting for Services to Obtain FedRAMP-Authorization

Over half of both federal and state and local respondents indicate there are no cloud services their agency is interested in using but waiting to use until it obtains FedRAMP-authorization.

Examples include:
- Atlassian Cloud
- REDCap
- RelativityOne

\[\text{FedRAMP} - \text{Statistically significant difference}\]
Federal respondents most often perceive the top challenge to adopting a FedRAMP-authorized solution is multiple solutions may need to be adopted since not all FedRAMP-authorized solutions provide a comprehensive set of functionalities.

What do you perceive to be the top challenges or barriers to adopting a FedRAMP authorized solution? (select all that apply)

- Slow process in order to get a Joint Authorization Board (JAB) certification
- Some FedRAMP solutions may only be available in a cloud environment that my agency does not currently use
- There are not enough solutions and services available in the FedRAMP Marketplace that meet my requirements
- Would rather keep mission-critical data on-premises than in the cloud
- Vendor lock-in/Lack of flexibility in moving from one cloud to another
- Internal personnel are needed to validate the FedRAMP security package for Authority to Operate (ATO) solutions
- Multiple solutions may need to be adopted since not all FedRAMP authorized solutions provide a comprehensive set of functionalities
- Internal personnel are needed to validate the FedRAMP security package for Authority to Operate (ATO) solutions
- Some FedRAMP solutions may only be available in a cloud environment that my agency does not currently use
- Slow process in order to get a Joint Authorization Board (JAB) certification

Note: Multiple responses allowed.
What do you perceive to be the top challenges or barriers to adopting a FedRAMP authorized solution? (select all that apply)

<table>
<thead>
<tr>
<th>Challenge</th>
<th>State and Local</th>
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<tbody>
<tr>
<td>Slow process in order to get a Joint Authorization Board (JAB) certification</td>
<td>44%</td>
</tr>
<tr>
<td>Multiple solutions may need to be adopted since not all FedRAMP authorized solutions provide a comprehensive set of functionalities</td>
<td>43%</td>
</tr>
<tr>
<td>Internal personnel are needed to validate the FedRAMP security package for Authority to Operate (ATO) solutions</td>
<td>40%</td>
</tr>
<tr>
<td>Vendor lock-in/Lack of flexibility in moving from one cloud to another</td>
<td>38%</td>
</tr>
<tr>
<td>There are not enough solutions and services available in the FedRAMP Marketplace that meet my requirements</td>
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<td>Some FedRAMP solutions may only be available in a cloud environment that my agency does not currently use</td>
<td>26%</td>
</tr>
<tr>
<td>None of the above</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: Multiple responses allowed.
Over half of federal respondents consider a top benefit of adopting a FedRAMP-authorized solution to be the ease of adhering to government mandates and NIST guidelines.
Benefits of Adopting a FedRAMP-authorized Solution

STATE AND LOCAL

Over half of state and local respondents consider a top benefit of adopting a FedRAMP-authorized solution to be the ease of adhering to government mandates and NIST guidelines.

- Ease of adhering to government mandates and NIST guidelines: 56%
- Due diligence burdens are reduced allowing a faster time to delivery: 46%
- Receiving an independently audited third-party security assessment each year: 41%
- Long-term cost savings: 40%
- Acts as a catalyst to accelerate cloud adoption: 38%
- Solutions have inherent continuous monitoring with resolutions of potential non-compliance incidents: 34%
- Receiving monthly reports on the security posture of my applications and data: 27%
- None of the above: 2%

Note: Multiple responses allowed.

State and Local

Note: Large states are defined as populations of 5 million or more. Small states are defined as populations of 4.9 million or less.
Significantly more state and local than federal respondents agree that mission data is more secure in the cloud than on-premises and would be comfortable using a cloud product at work that is not FedRAMP-authorized.

SURVEY FINDINGS

Cloud Sentiments

Please indicate the extent to which you agree or disagree with the following statements.

% Strongly/Somewhat Agree

- A cloud environment is not the optimal environment for every application
- Cloud computing technology is essential to my agency’s operations
- FedRAMP simplifies the cloud adoption process for agencies
- I’m able to find the products my agency needs on the FedRAMP Marketplace
- Mission data is more secure in the cloud than on-premises
- I would be comfortable using a cloud product at work that is not FedRAMP authorized

= statistically significant difference
Survey Findings

Location of Citizen and Mission Data

For both federal and state and local respondents, their agency’s citizen and mission data is located primarily on-premises, but they would prefer for the data to be in a cloud environment.

Note: Multiple responses allowed.

Where is your agency’s citizen and mission data currently stored, and where would you prefer it be stored? (select all that apply)
Agency Performance Keeping Data Secure

Nearly all federal and state and local respondents rate their agency’s performance in keeping its citizen and mission data secure either excellent or good.
Reasons for Excellent/Good Agency Performance

Federal respondents most often report their agency’s excellent/good performance is due to having no incidents/breaches/hacks, while state and local respondents say they have an excellent track record.

Coded Responses

- No incidents/breaches/hacks
- Good system/advanced technologies/solutions/tools in place
- FedRAMP protocols/strict policies/processes in place
- Protection could be better/some vulnerabilities/not perfect
- Security is a top priority/serious focus/duty/responsibility
- Excellent track record/very secure/safe/the best
- Only minor problems/glitches/issues/data loss
- Continuous improvements/monitoring/updates/audits
- Excellent IT staff/expertise/knowledge/team work
- Cloud provides more safety features
- Hard work/doing everything possible/strong efforts

Note: Responses with multiple mentions are shown.

INSIGHTS

We have always done a good job keeping data secure. I cannot recall a breach as long as I've been with the agency.
[FEDERAL CIVILIAN, IT PROGRAM MANAGER]

All our policies and methods are well thought and well researched. We have had negligible issues with almost zero impact.
[STATE, SYSTEMS ADMINISTRATOR]

We are employing several security programs to protect data. Plus, we hold annual training and quarterly inspections.
[DOD, PROCUREMENT ANALYST]
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