

FedRAMP Survey Results Report



Research Objective

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

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%.

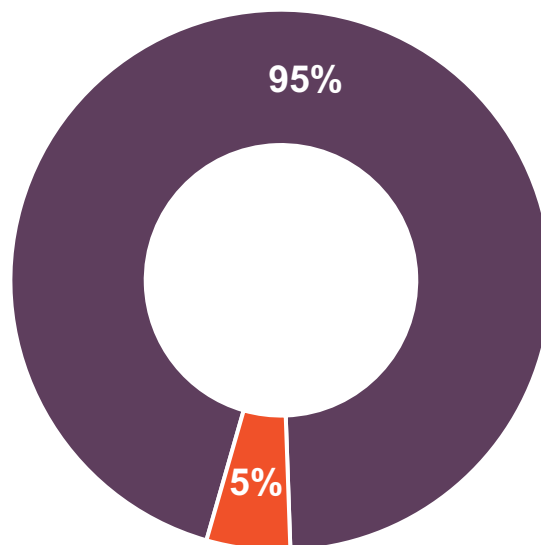
Respondent Classifications



Federal Agency Types Represented

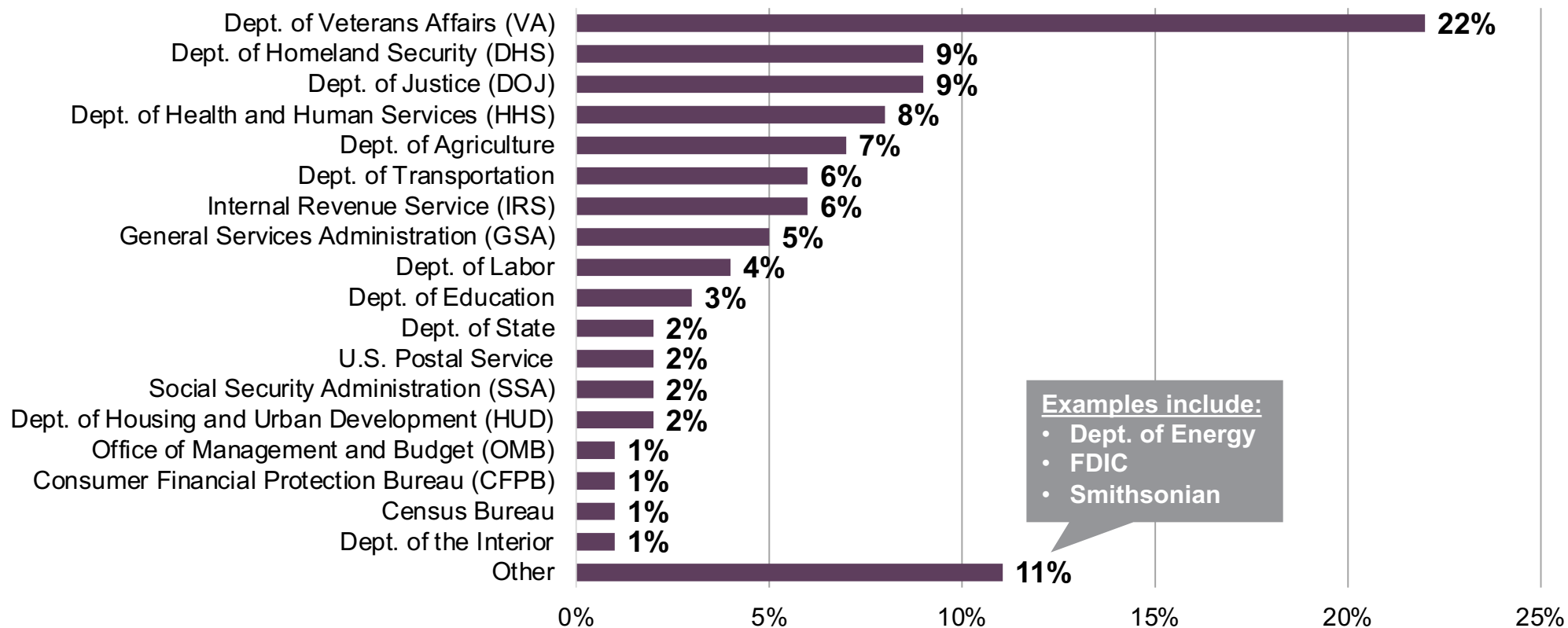
Per quotas that were set, nearly all federal respondents work for a federal civilian agency.

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



Federal Civilian Agencies Represented

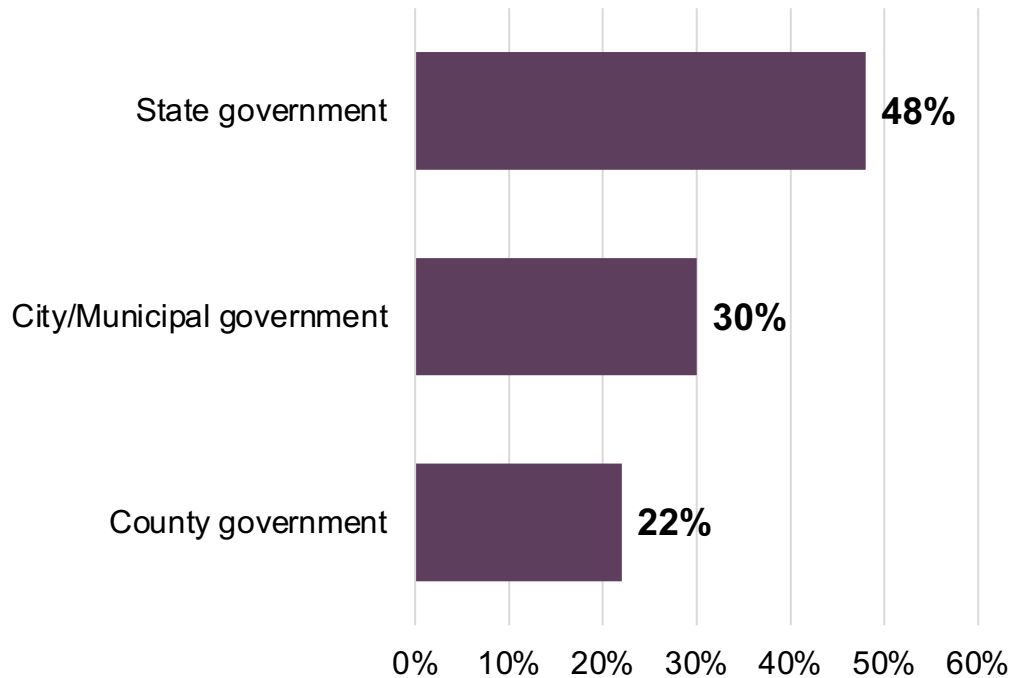
A variety of federal civilian agencies are represented, with the most representation from VA, DHS, DOJ, and HHS.



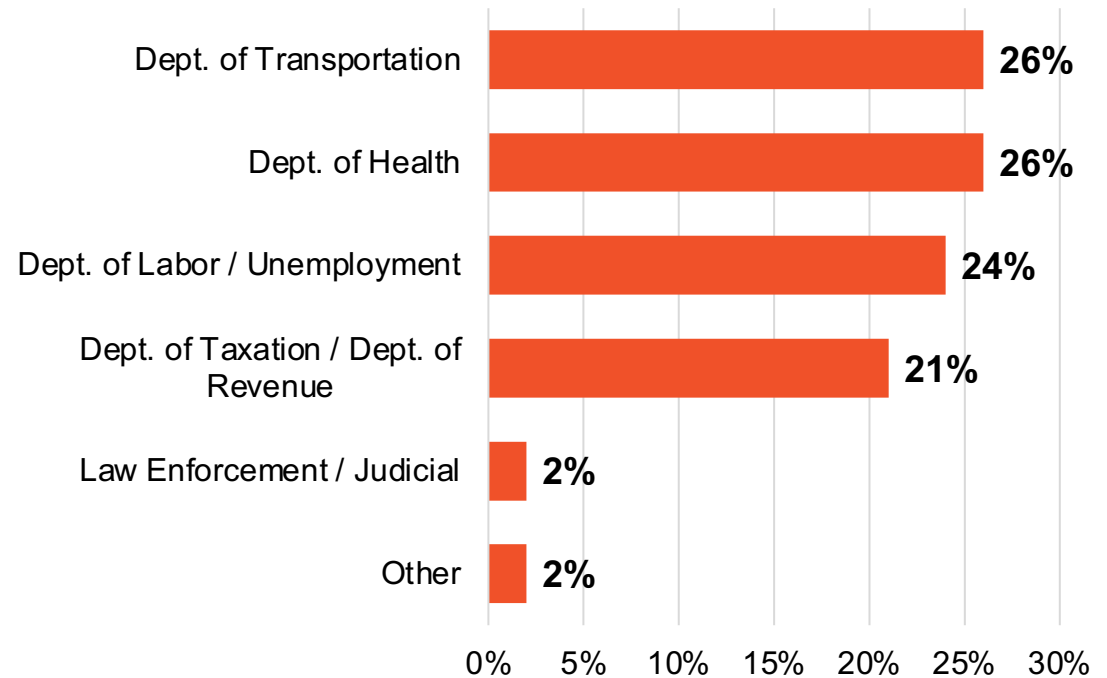
State and Local Agencies Represented

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 Agency Type



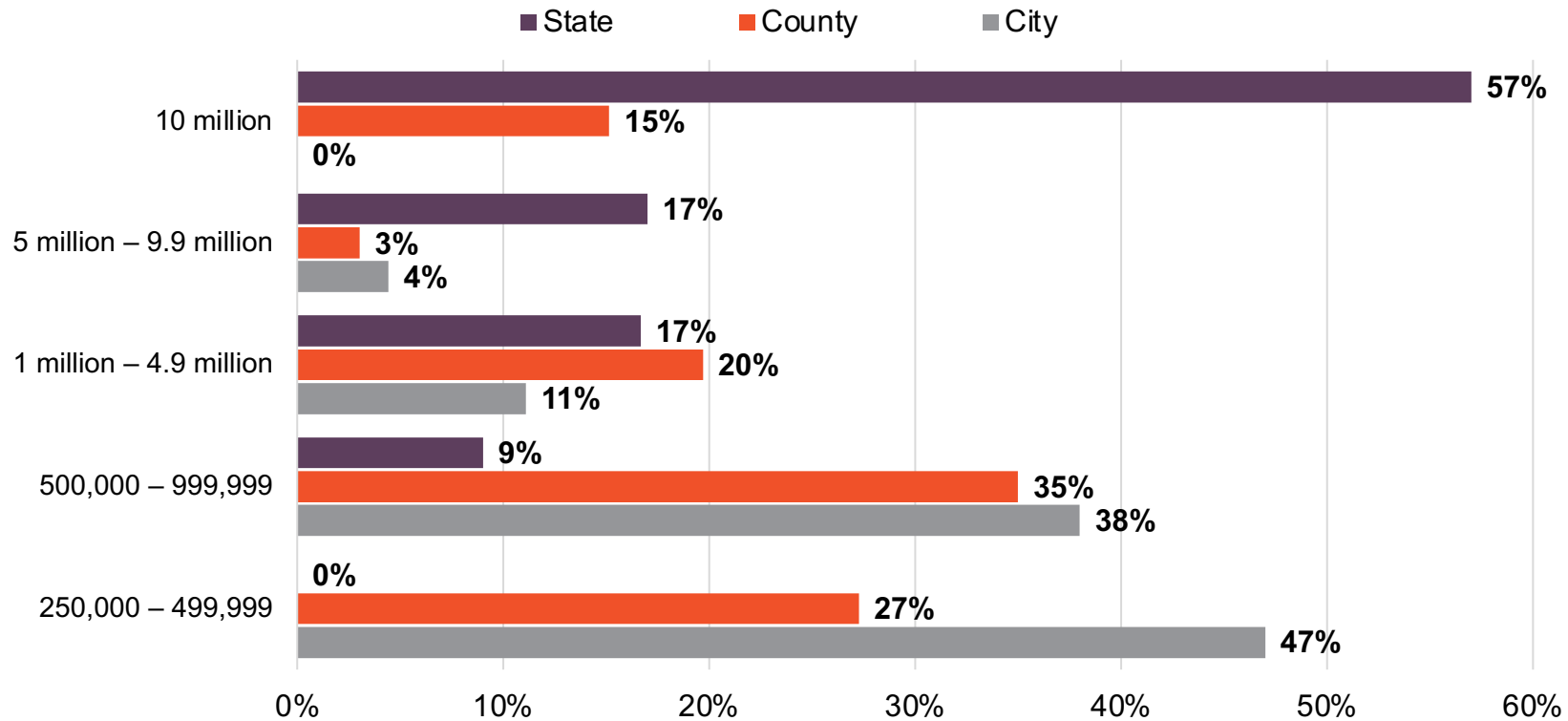
Agencies



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 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.

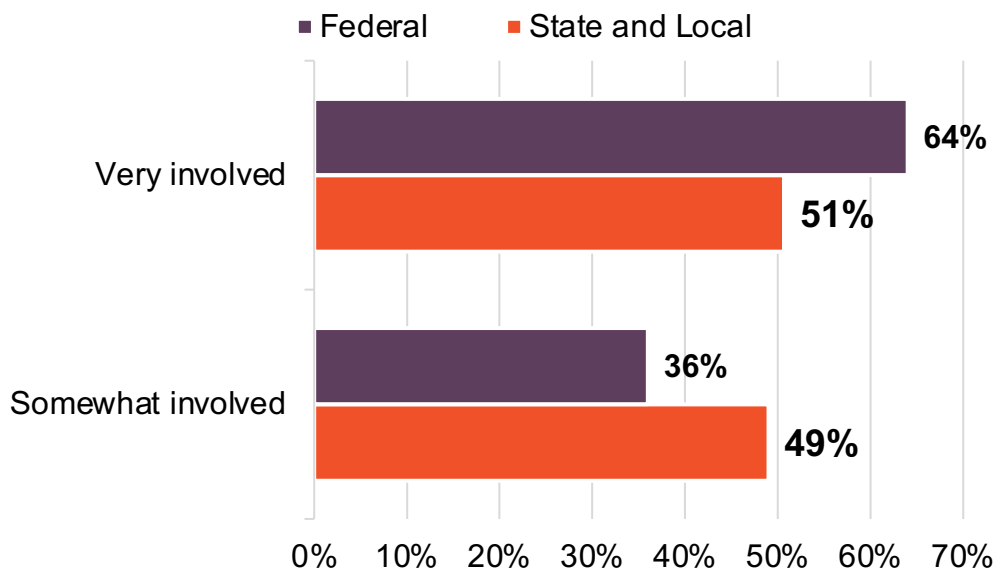


What is the estimated population of the ["STATE", "COUNTY" OR "CITY"] that you work for?

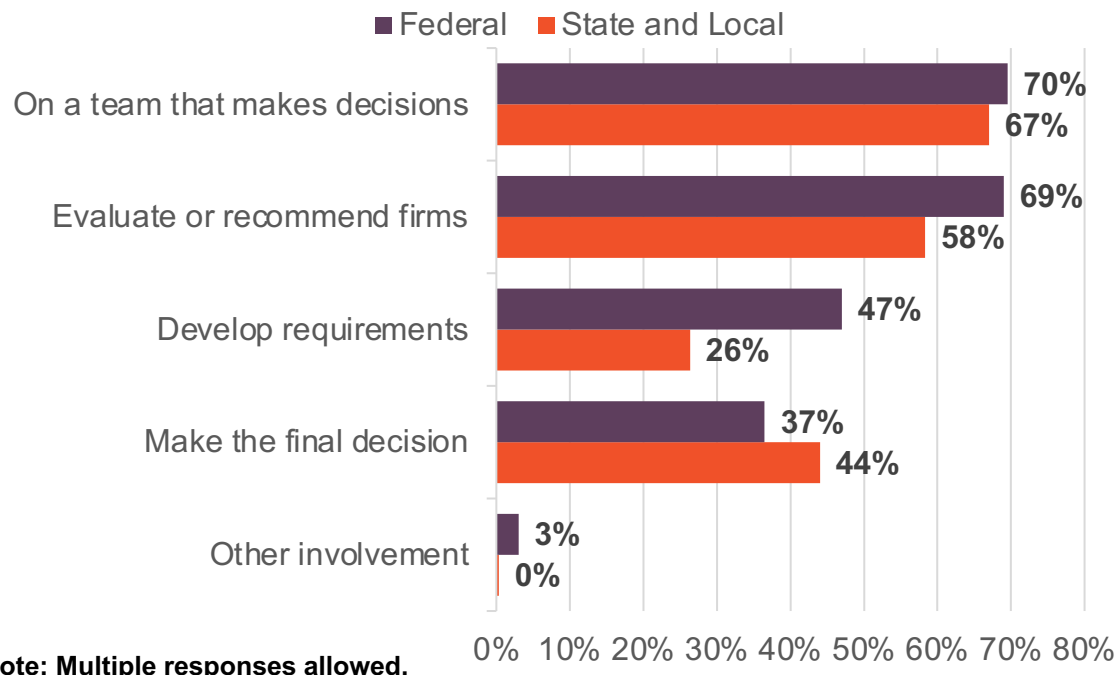
Involvement with Citizen Services and IT Firm Selection

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



Involvement in Selection of IT Firms



Note: Multiple responses allowed.

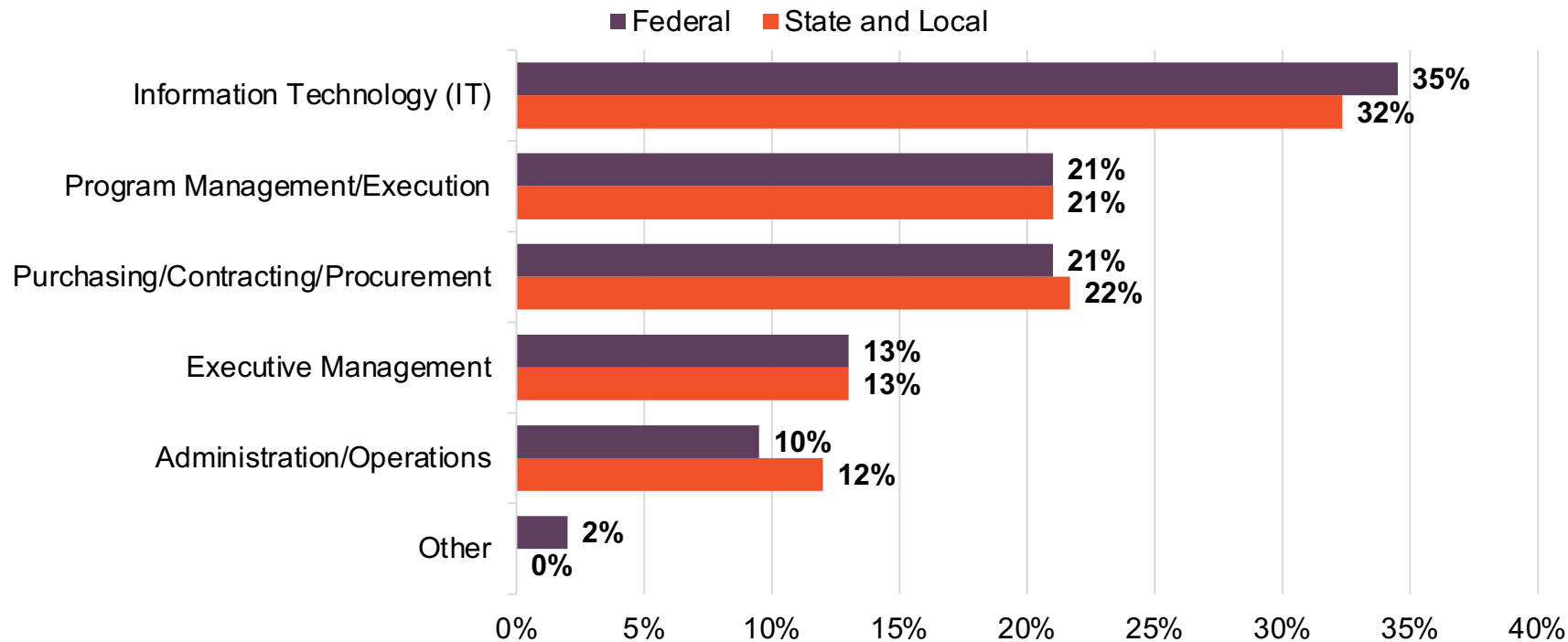


For your organization, how would you describe your level of involvement in programs and services that have direct interaction with citizens/constituents/customers?

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)

Job Role

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



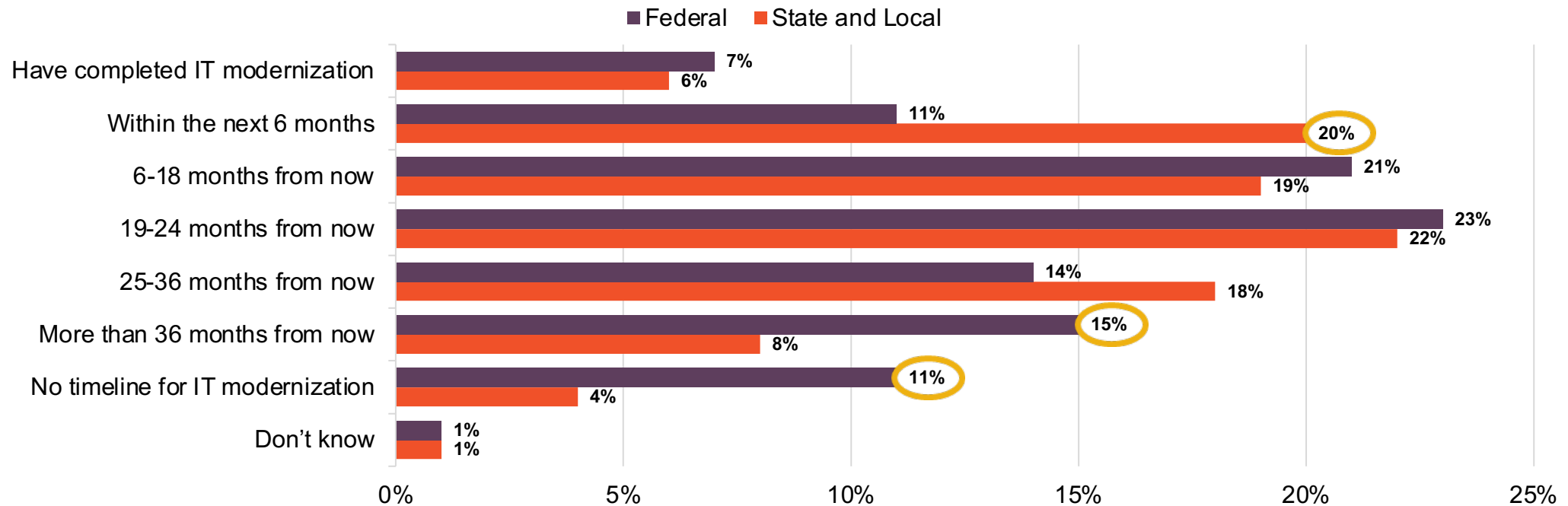
Which of the following best describes your role in your organization?
What is your current job title? (open end)

Survey Findings



Timeframe for Modernizing All IT Systems

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.



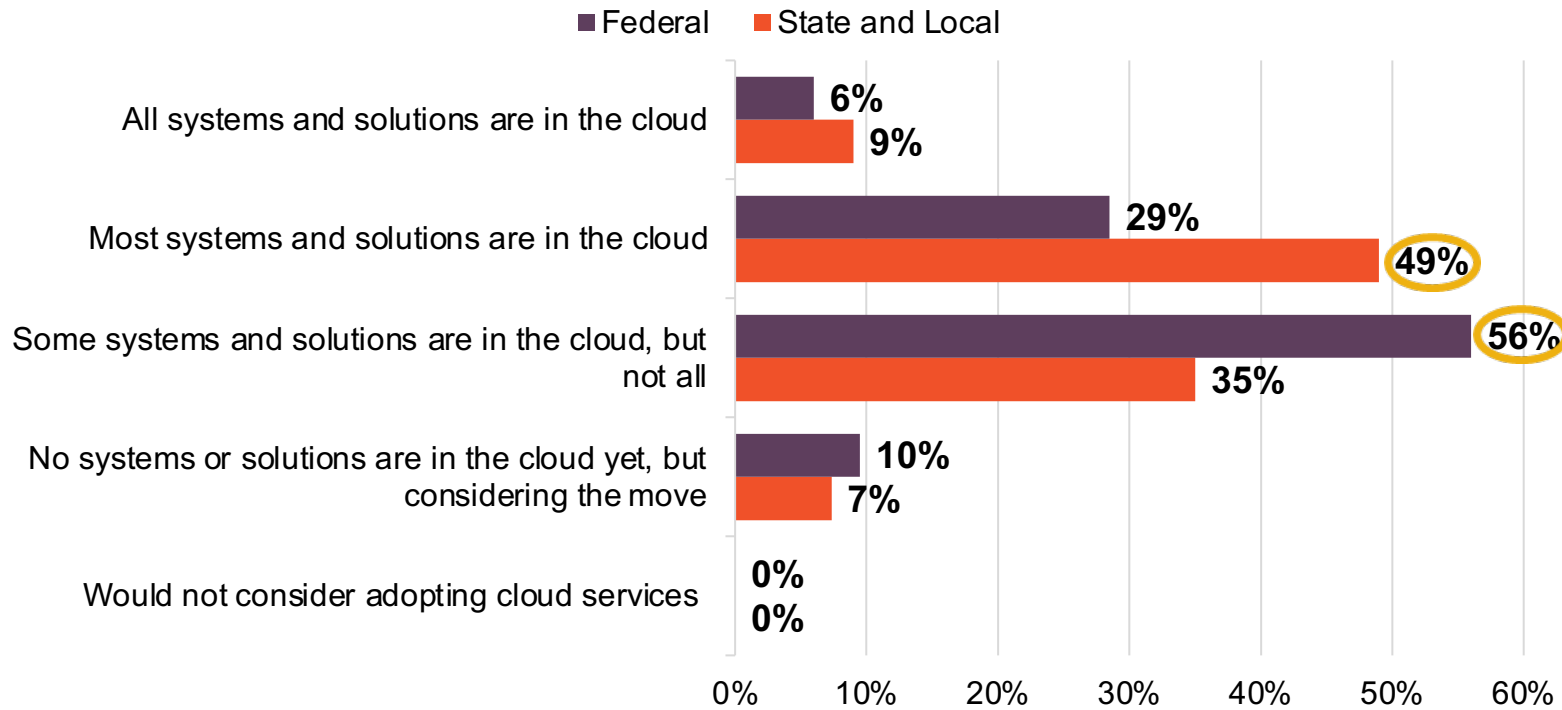
What is your agency's current timeframe for modernizing all IT systems in its enterprise?



= statistically significant difference

Cloud Services Adoption

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.



	State	Local
All systems and solutions are in the cloud	13%	6%
	Larger counties/cities	Smaller counties/cities
All systems and solutions are in the cloud	13%	3%

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.



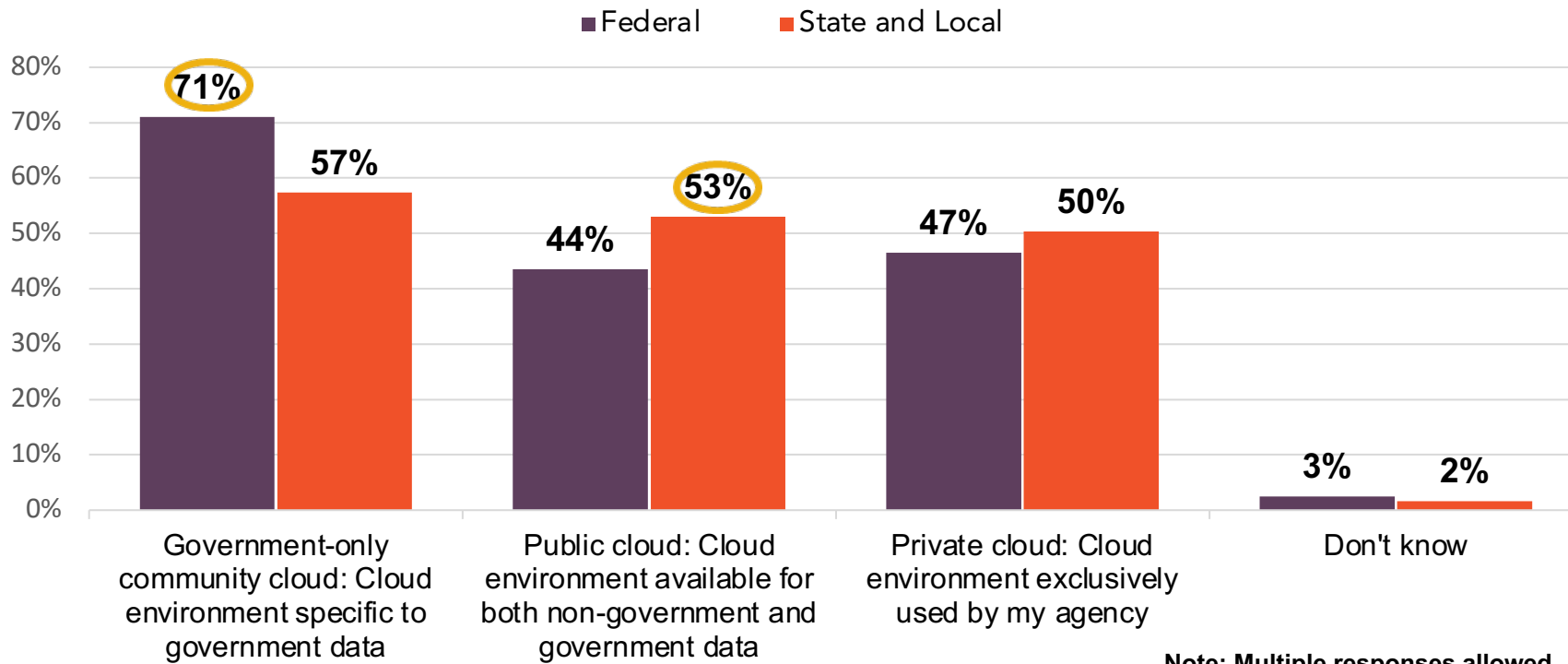
Which of the following best describes your agency’s adoption of cloud services?



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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.



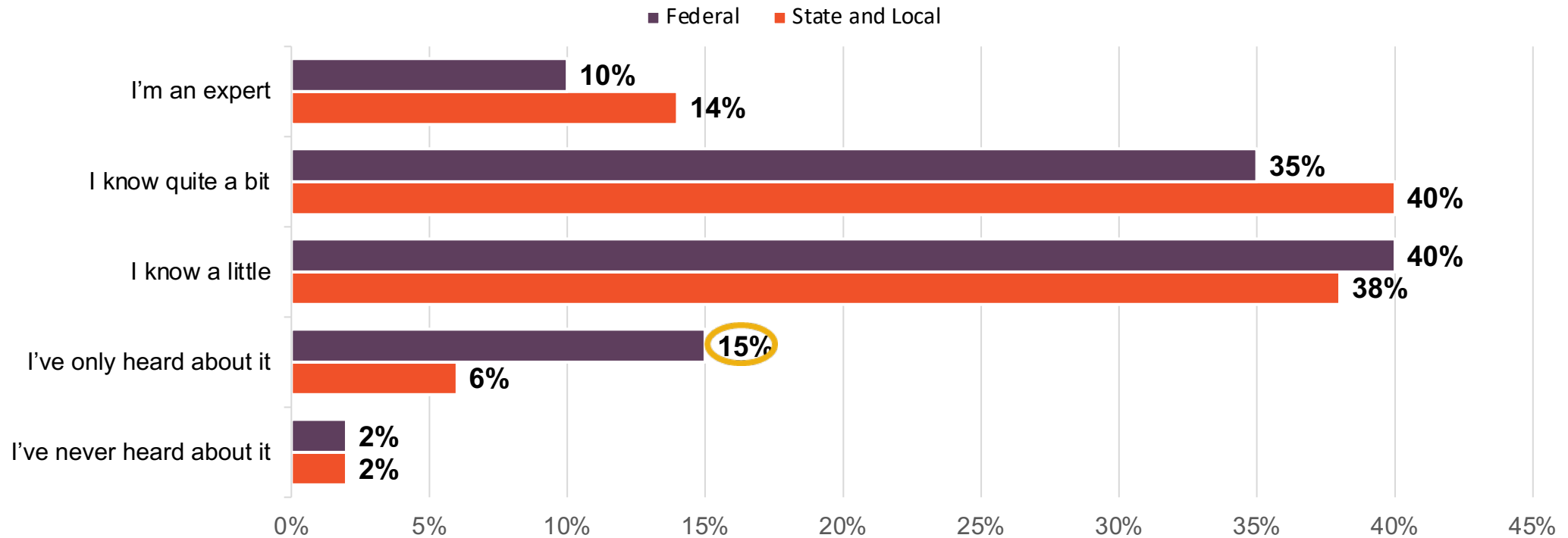
	Larger counties / cities	Smaller counties / cities
Public cloud	38%	61%

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.



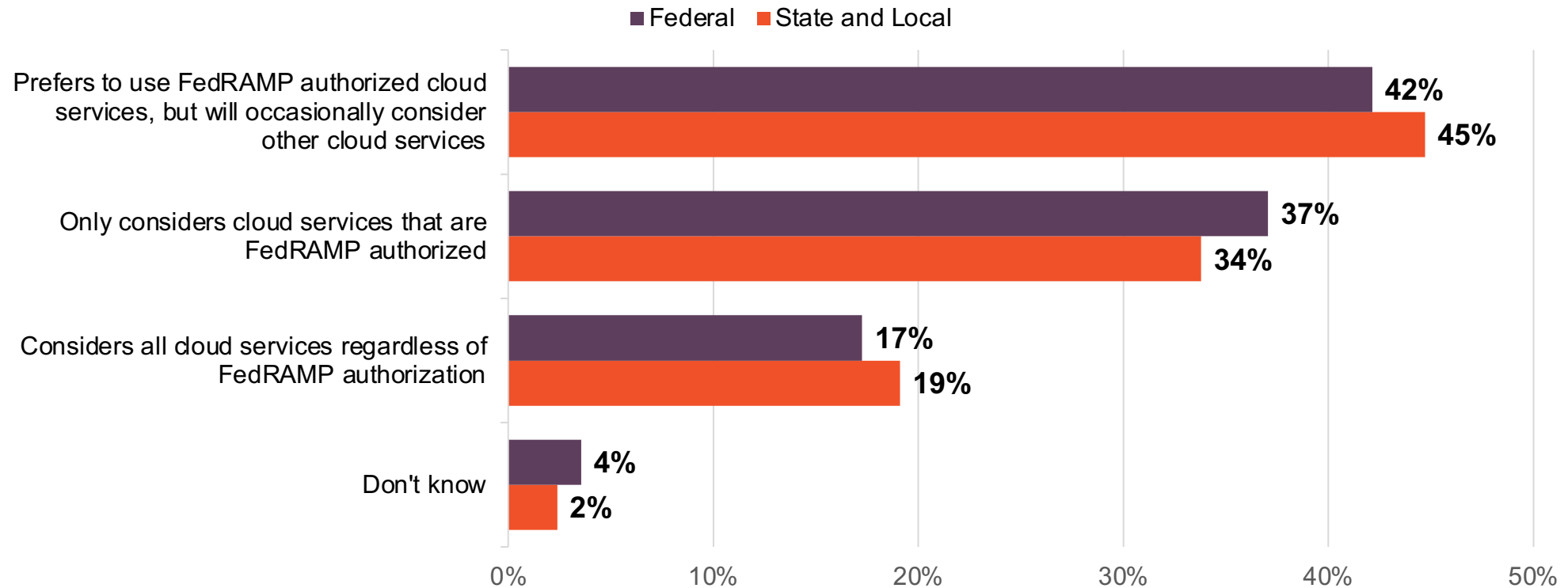
How would you describe your level of familiarity with FedRAMP (Federal Risk Authorization and Management Program)?



= statistically significant difference

Types of Cloud Services Considered

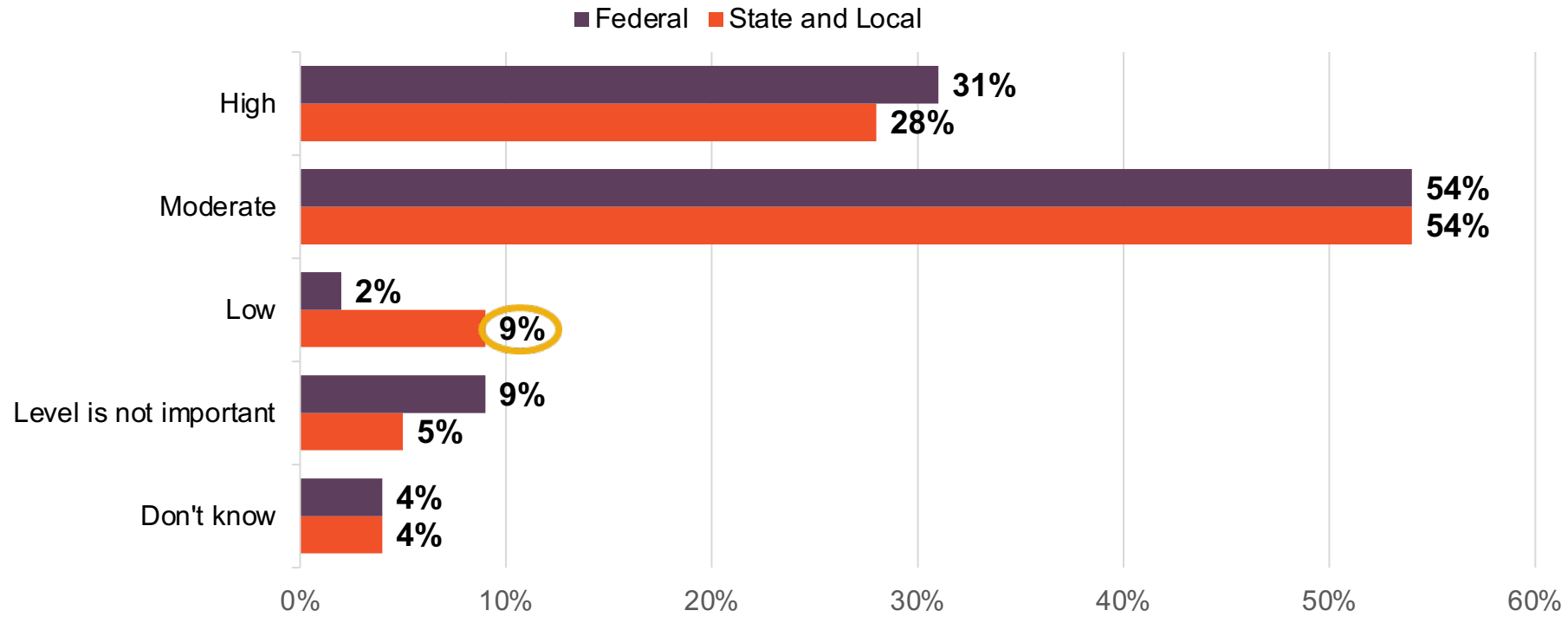
Both federal and state and local respondents most often report their agency prefers to use FedRAMP-authorized cloud services but will occasionally consider other cloud services.



Which of the following statements best describes the types of cloud services your agency considers using?

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.



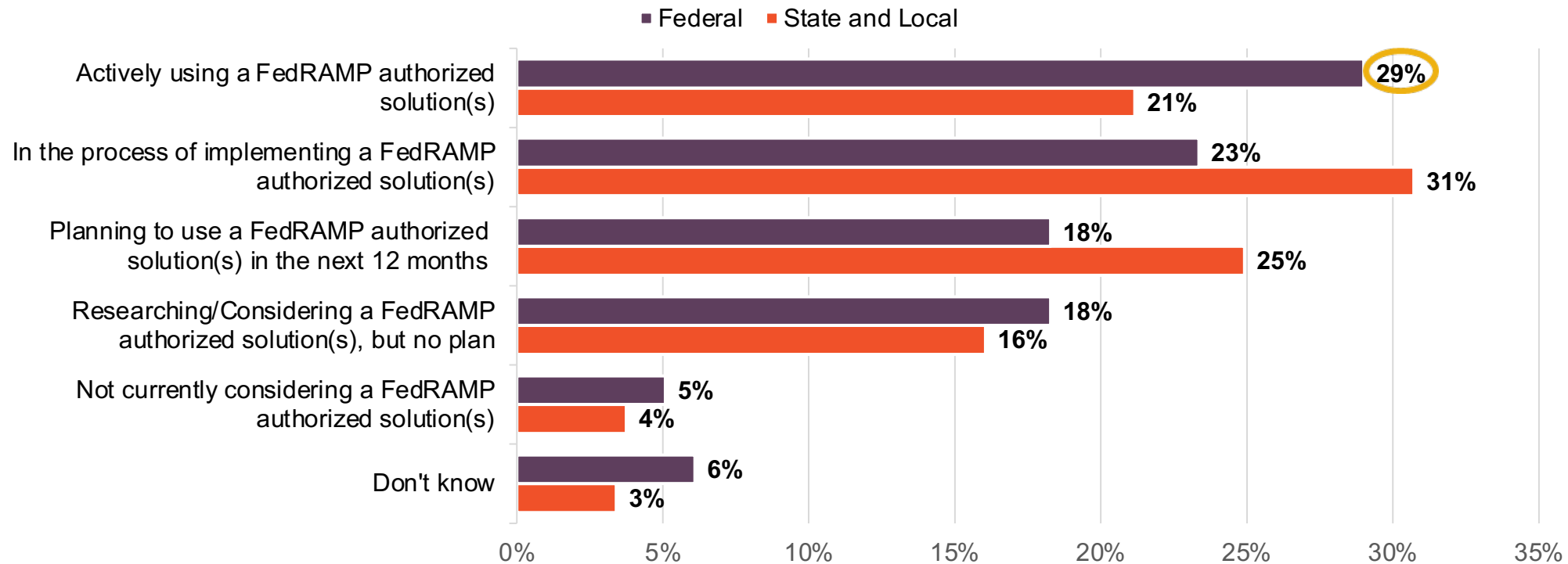
What impact level of FedRAMP authorization is important to your agency for a cloud service provider to have?



= statistically significant difference

Adoption of FedRAMP-Authorized Solutions

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.



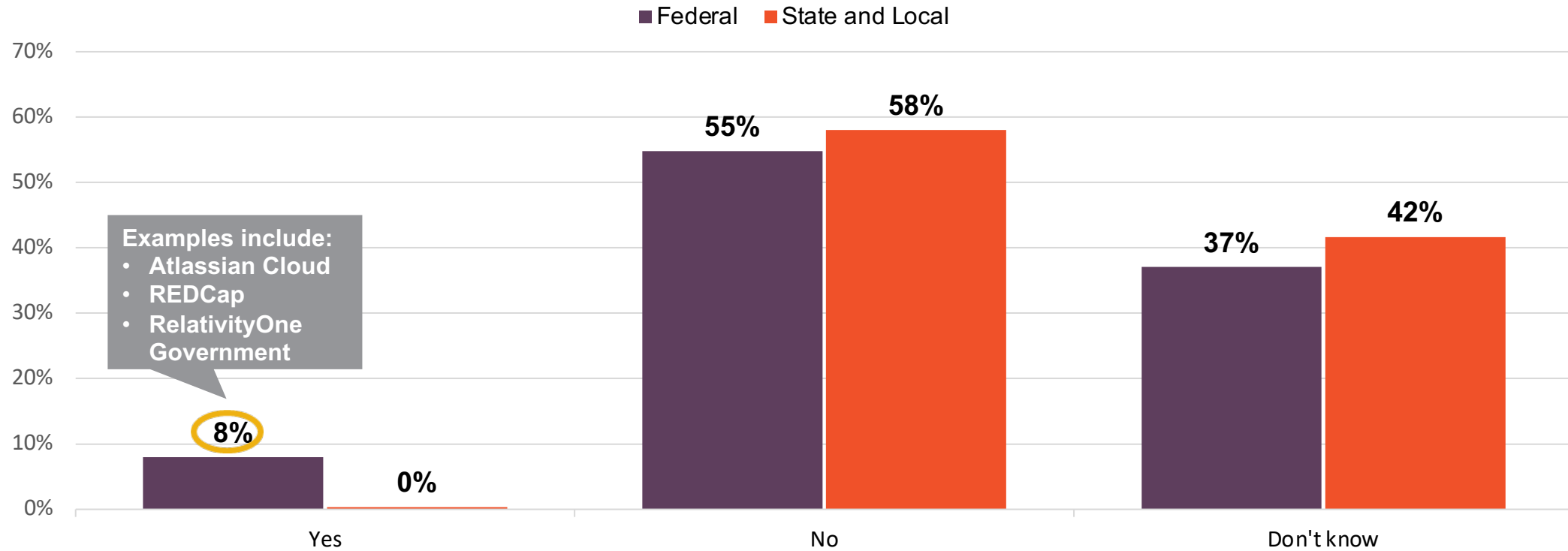
To what extent have FedRAMP authorized solutions been adopted in your agency?



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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.



Are there any cloud services your agency is interested in using but will wait to use the service until it obtains FedRAMP authorization?

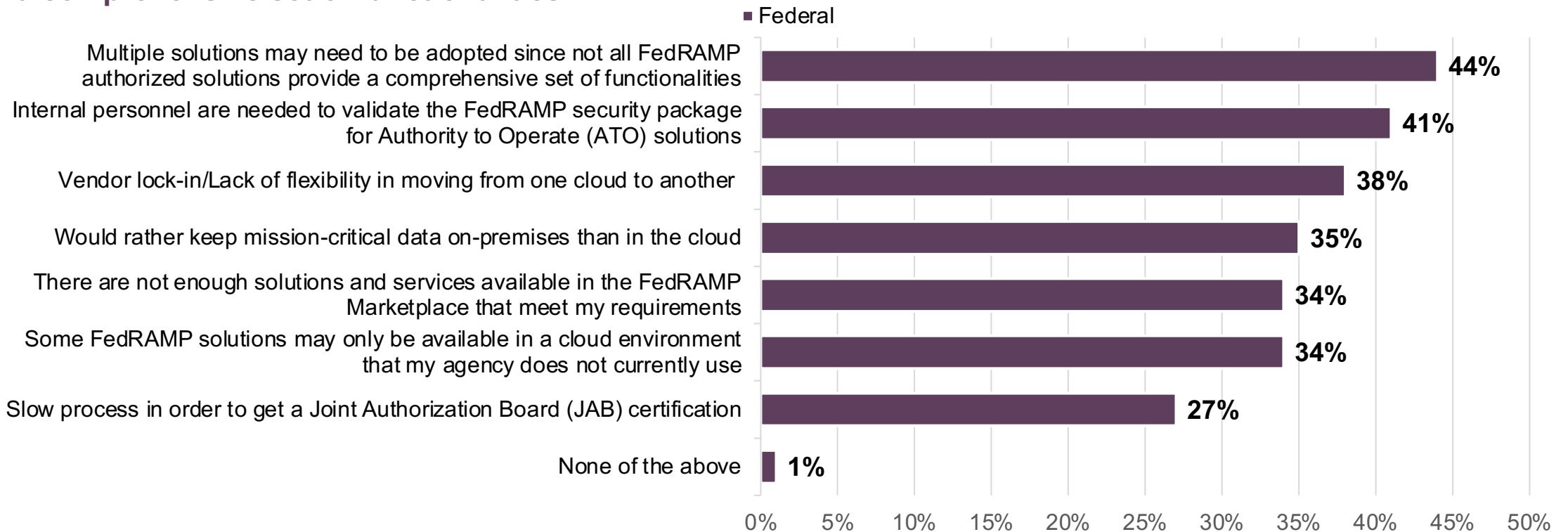


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Challenges to Adopting a FedRAMP-Authorized Solution

FEDERAL

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.



Note: Multiple responses allowed.

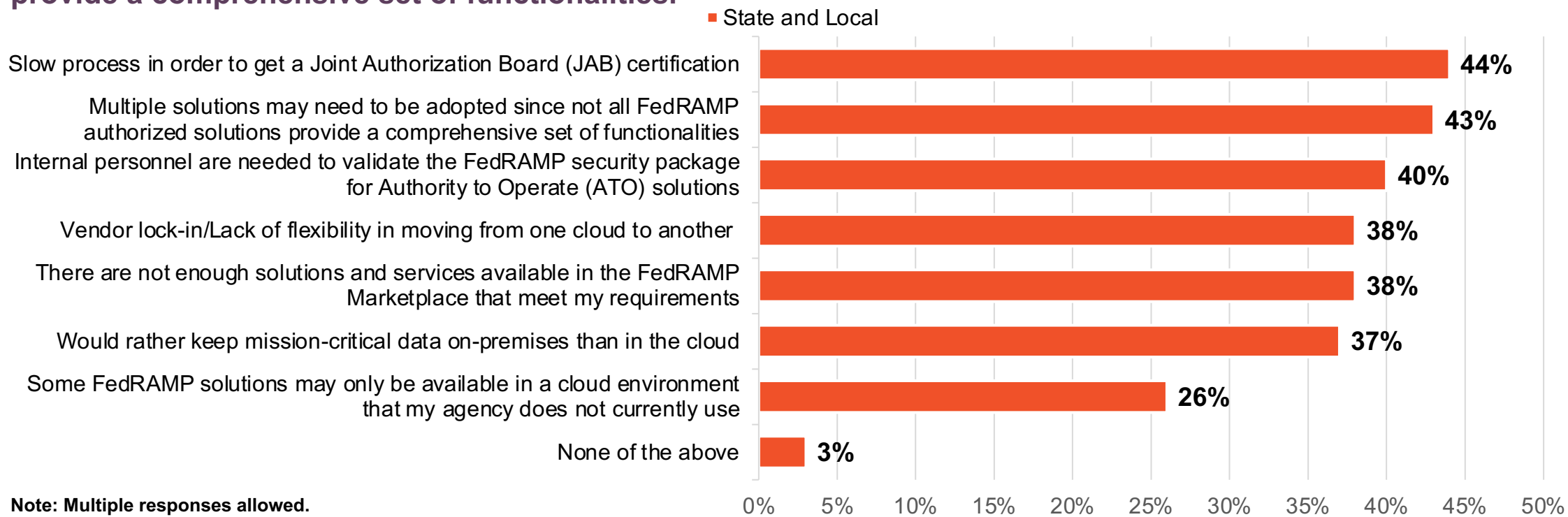


What do you perceive to be the top challenges or barriers to adopting a FedRAMP authorized solution? (select all that apply)

Challenges to Adopting a FedRAMP-authorized Solution

STATE AND LOCAL

State and local respondents most often report the top challenge to adopting a FedRAMP-authorized solution is the slow process in order to get a Joint Authorization Board (JAB) certification, closely followed by multiple solutions may need to be adopted since not all FedRAMP authorized solutions provide a comprehensive set of functionalities.

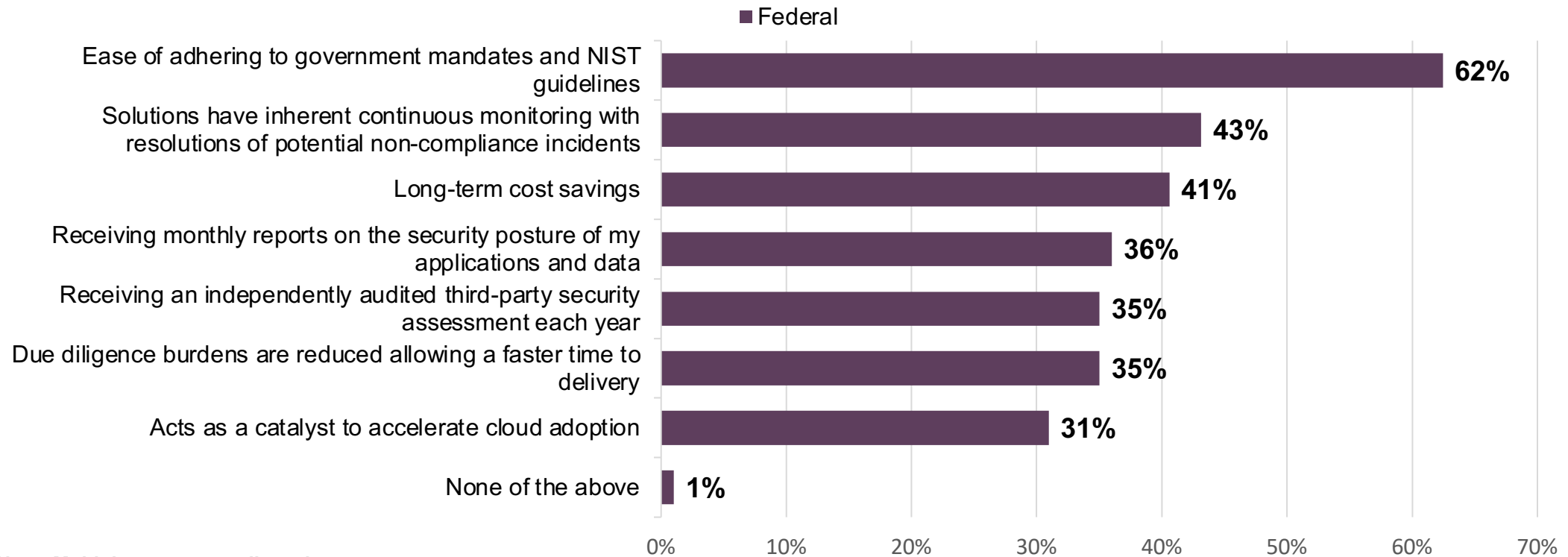


What do you perceive to be the top challenges or barriers to adopting a FedRAMP authorized solution? (select all that apply)

Benefits of Adopting a FedRAMP-authorized Solution

FEDERAL

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.

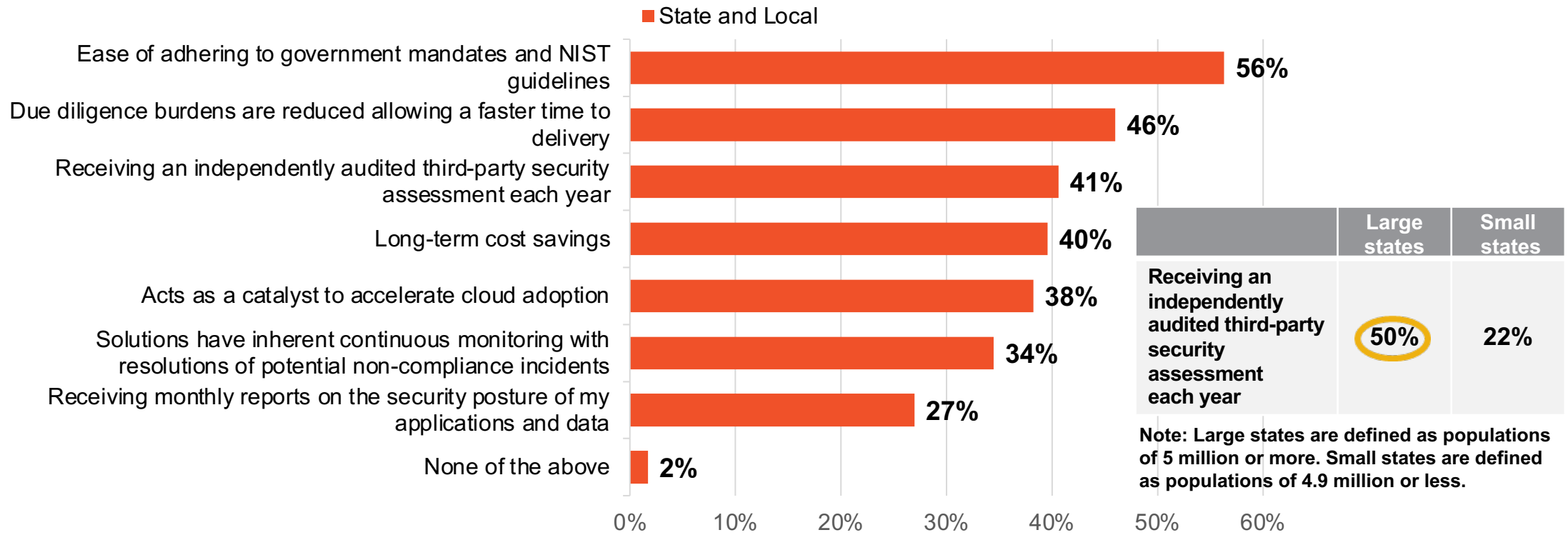


Note: Multiple responses allowed.

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.



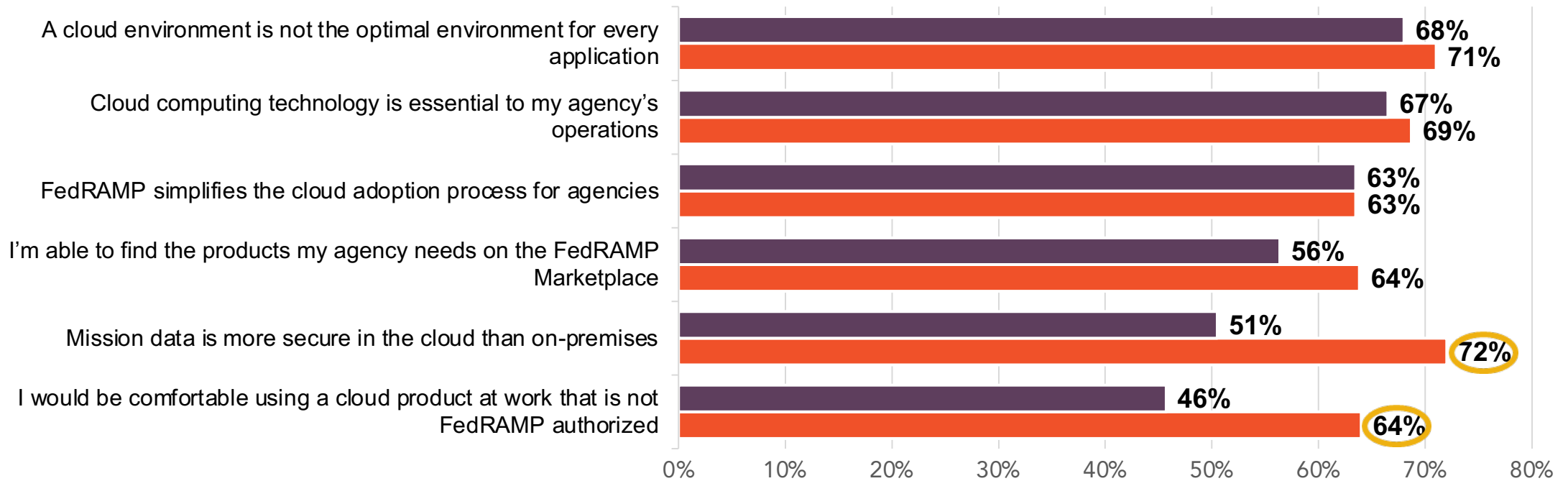
Note: Multiple responses allowed.

Cloud Sentiments

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.

% Strongly/Somewhat Agree

■ Federal ■ State and Local



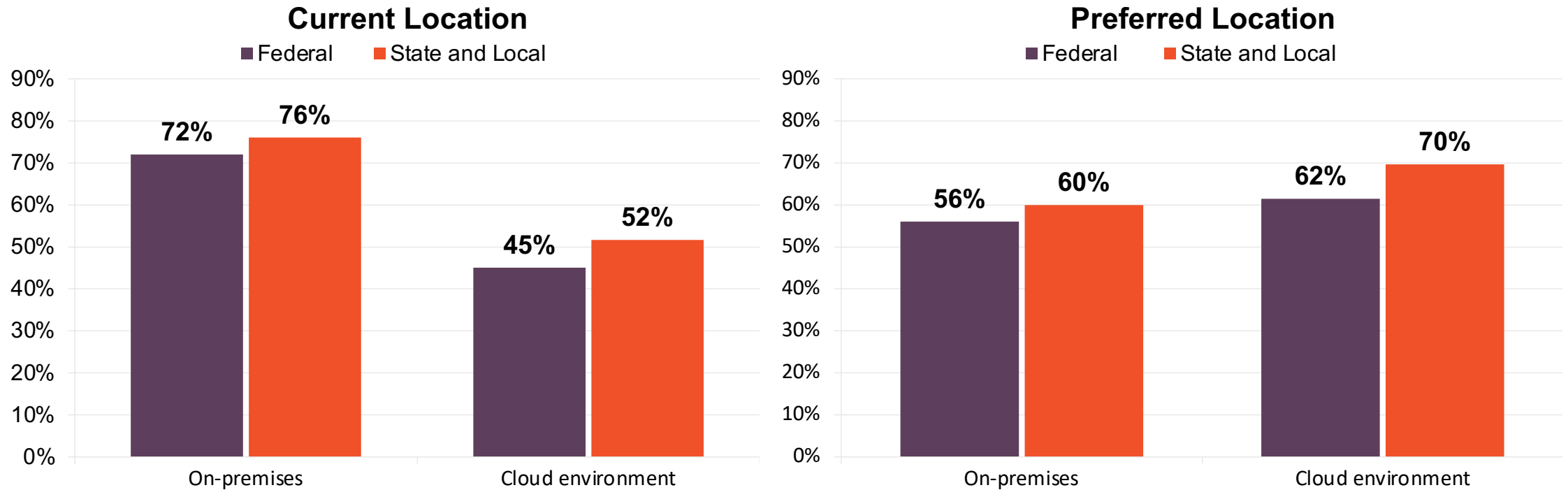
Please indicate the extent to which you agree or disagree with the following statements.



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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.



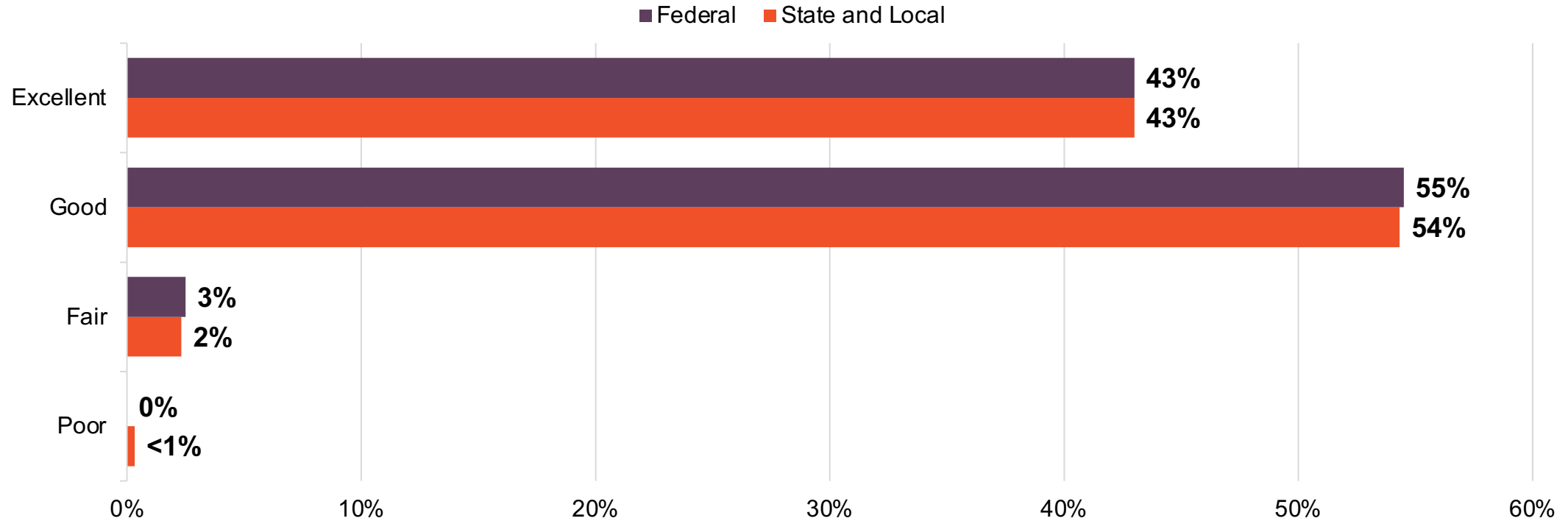
Note: Multiple responses allowed.



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.



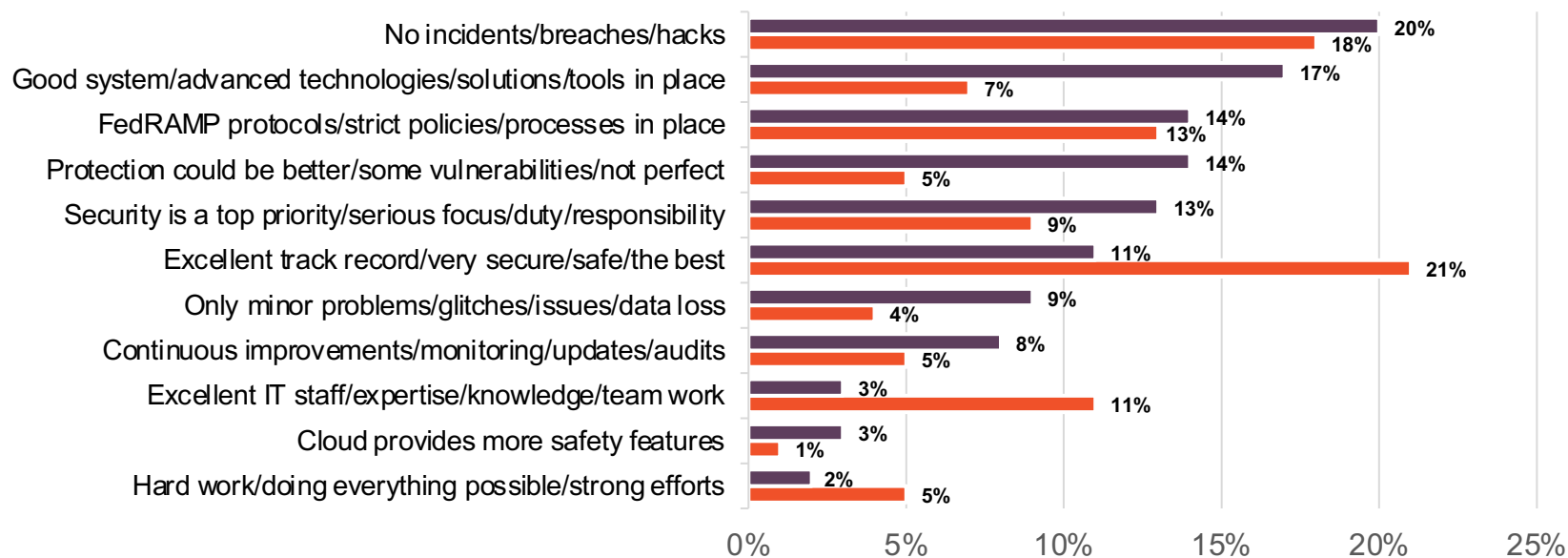
How would you rate your agency's performance in keeping its citizen and mission data secure?

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

■ Federal ■ State and Local



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]



You rated your agency's performance in keeping its citizen and mission data secure as [PIPE IN PREVIOUS RESPONSE]. What makes you say that? (open end)

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