

Government Efficiency and Accountability Review (GEAR)

GEAR29 Board Meeting

May 18th 2022



<https://GEAR.Delaware.gov/>

Agenda

15 min

1. Introductions/Roll Call
2. Old Business
 - Review and Approve Minutes
 - 2022 Schedule

3. New Business

90 min

4. Enterprise Services Delivery
5. GEAR Field Team
6. Open Topics Discussion – Board
7. Public Comment
8. Adjourn

Introductions

Roll Call

Old Business

Review/Approve Minutes from Prior Board meeting

Final draft version sent to Board for review May 10th, 2022



Old Business

2022 GEAR Board Schedule

Month	Date & Time	Location and/or Virtual
January	Tues, 1/11 at 10 am	Virtual
March	Tues, 3/16 at 10am	Virtual
May	Weds, 5/18 at 10am	Carvel and Virtual
July	Tues, 7/12 at 10am	TBD
September	Weds, 9/13 at 10am	TBD
November	Tues, 11/16 at 10am	TBD

Meetings will be held both in person and virtually.
Detailed information will be provided prior to meeting date.

Please contact Bobbi DiVirgilio at 302-577-8546 or bobbi.divirgilio@delaware.gov for more information



New Business

- Introduction
- GEAR Enterprise Services Delivery, GEAR Field Team, and GEAR P3 Task Force continue regular meetings
 - Ernie Dianastasis update
 - Governor’s Team Excellence - GEAR P3 Innovation & Efficiency Award and Trailblazer Awards
 - Ready in 6
- GEAR Portfolio Summary

Governor's Team Excellence - GEAR P3 Innovation & Efficiency Award and Trailblazer Awards [\(May 5th Award Video\)](#)

GEAR P3 Innovation & Efficiency - *Overdose and Police Diversion Program*

Nominated by Colonel Melissa Zebley, DSHS/Delaware State Police

- Team Lead- Sean Moriarty; Team - Charles Sawchenko, Albert Roop, David Hume, Allison Abessinio, Rick Urey, Glenn Owens, Claire Wang
 - Three agencies (DSP, DOJ, DSAMH) developed partnership and program
 - Real time intervention for mental health or substance disorder
 - Diversion from the criminal justice system

GEAR P3 Trailblazer Award Recipient - *Holly Reynolds* - DOF/DOR

Nominated by Warren D. Wood, DOF/Division of Revenue

- Taxpayer cases – 476, Assessments - \$618,529, Collections - \$122,491
- Managed Taxpayer returns processed – 4,500+ , Fraudulent Refunds stopped - \$2,343,909, fiduciary and composite return processing - 8,000+ returns, E-file testing, Dover & Georgetown Public Service - Avg. 1,000+ calls/week, Audit Projects - yielding assessments of \$4,746,175



Thank you to this years' contributors - GEAR P3 Innovation & Efficiency Award and Trailblazer Awards



- Bank of America, Chip Rossi, Natalie Keefer and Connie Montana
- CSC and Scott Malfitano
- ChristianaCare and Rob McMurray
- Delmarva Power and Glenn Moore
- Highmark BCBS Delaware, Nick Moriello and Denee Crumrine
- JPMorgan Chase Bank and Don Mell
- M&T Bank, Nick Lambrow and April Birmingham
- The Precisionists Inc. (TPI) and Ernie Dianastasis
- W.L. Gore & Associate and Mike Ratchford
- WSFS Bank and Rodger Levenson



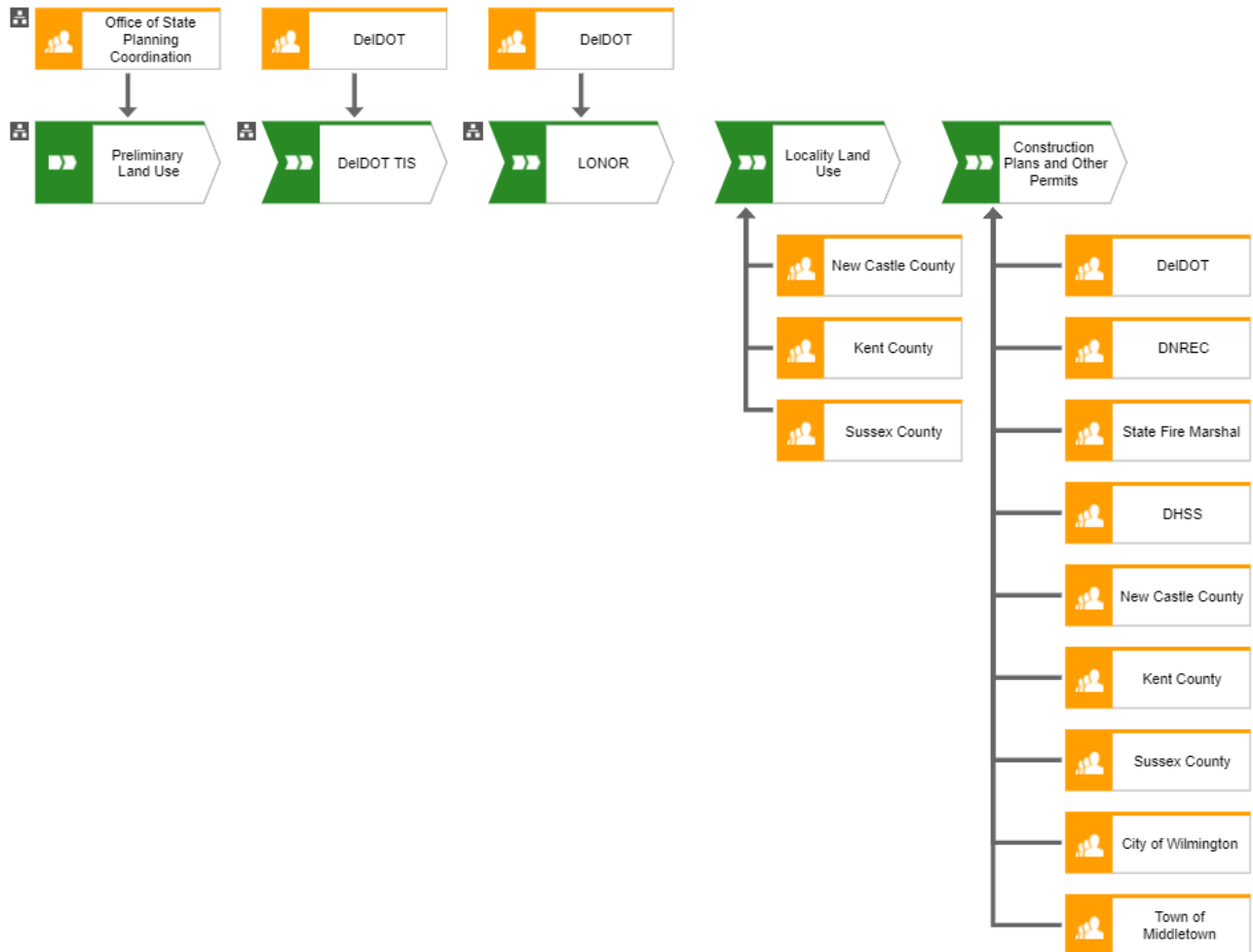
Ready in 6

- GEAR P3 Task Force Meeting – April 25th
 - Review of proposed legislative changes
 - Representative Bush’s agenda
 - Pain points and feedback being gathered from private and public sector perspectives
- Economic Development Liaison- Greg Patterson
 - GFT Continuous Improvement Practitioner (CIP) network engaged
 - Determining how CIP methods and practices can best assist Ready in 6 efforts
 - Longer term business process documentation and optimization first steps

GEAR Process Optimization Tool - Aris

< > ↑ Ready in 6 End to End Process Landscape ☆

Overview RACI Diagram Documents



GEAR Portfolio

- 13 Agencies, Judicial Branch, Enterprise Services Delivery team represented in portfolio
- Project Health
 - Green Project performing to plan
 - Yellow Project experiencing manageable challenges
 - Red Project experiencing significant issues
 - Gray Project being assessed or withdrawn
 - Blue Project complete
- 118 total projects

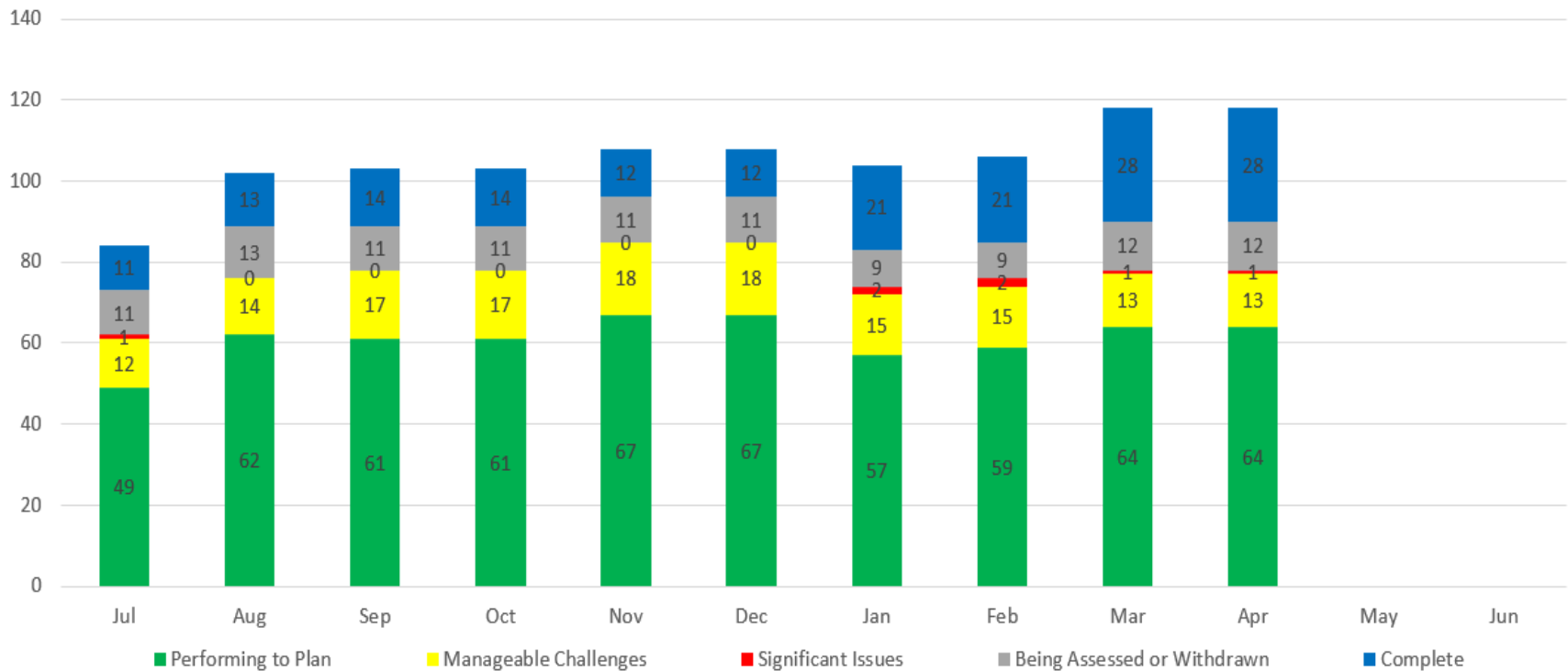
GEAR Portfolio Projects by Organization

***Enterprise Services Delivery team includes:**

- OST
- DOF
- DTI
- DHR
- OMB
- Auditor of Accounts

GEAR Portfolio Projects by Project Health

Project Totals



	SFY 2022											
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Total Projects	84	102	103	103	108	108	104	106	118	118	0	0

Deep Dives

Enterprise Services Delivery Team

ESD Deep Dive Project Presentations

1. Centralized Classification,
Recruitment, Hiring,
Onboarding and
Offboarding

Barbara McCleary (DHR)

2. Aerial Imagery & Land Use
Land Cover

**David Edgell (OMB),
Jason Vogl (OMB)**

3. Space Planning

**Jennifer Coverdale (OMB),
Dana Chant (OMB)**



Delaware Department of
Human Resources

Centralized Classification, Recruitment, Hiring, Onboarding and Offboarding Solution(s)



Classification, Recruitment, Onboarding and Offboarding Solution(s)

Overview

- System of record for classification and hiring data.
- DHR manages the recruitment process that includes managing the data related to job classifications, pay grades, recruiting candidates for vacancies, posting positions, overseeing the hiring process (interviews and selection), and offer letters.
- Onboarding process includes identity and employment verification, collection of personal data, creating employee record and setting up payroll, completing pension new hire actuarial form, and entering benefits information in PHRST.
- New Employee Orientation includes welcoming new employees to the State/ or new position, sharing benefits to working for the State, and initiating training and policy acknowledgement process in the Delaware Learning Center.
- Upon separation, DHR offboards employees that may include collecting access badge, keys, electronic devices, initiating pension form (PCC1), deactivate fleet access, direct deposit, and state credit card, and network/email access.
- Governed by State Merit Rules and Title 29.
- Original recruitment system (JobAps) contract expired 6/30/2021, two emergency extensions issued through 6/30/2023.

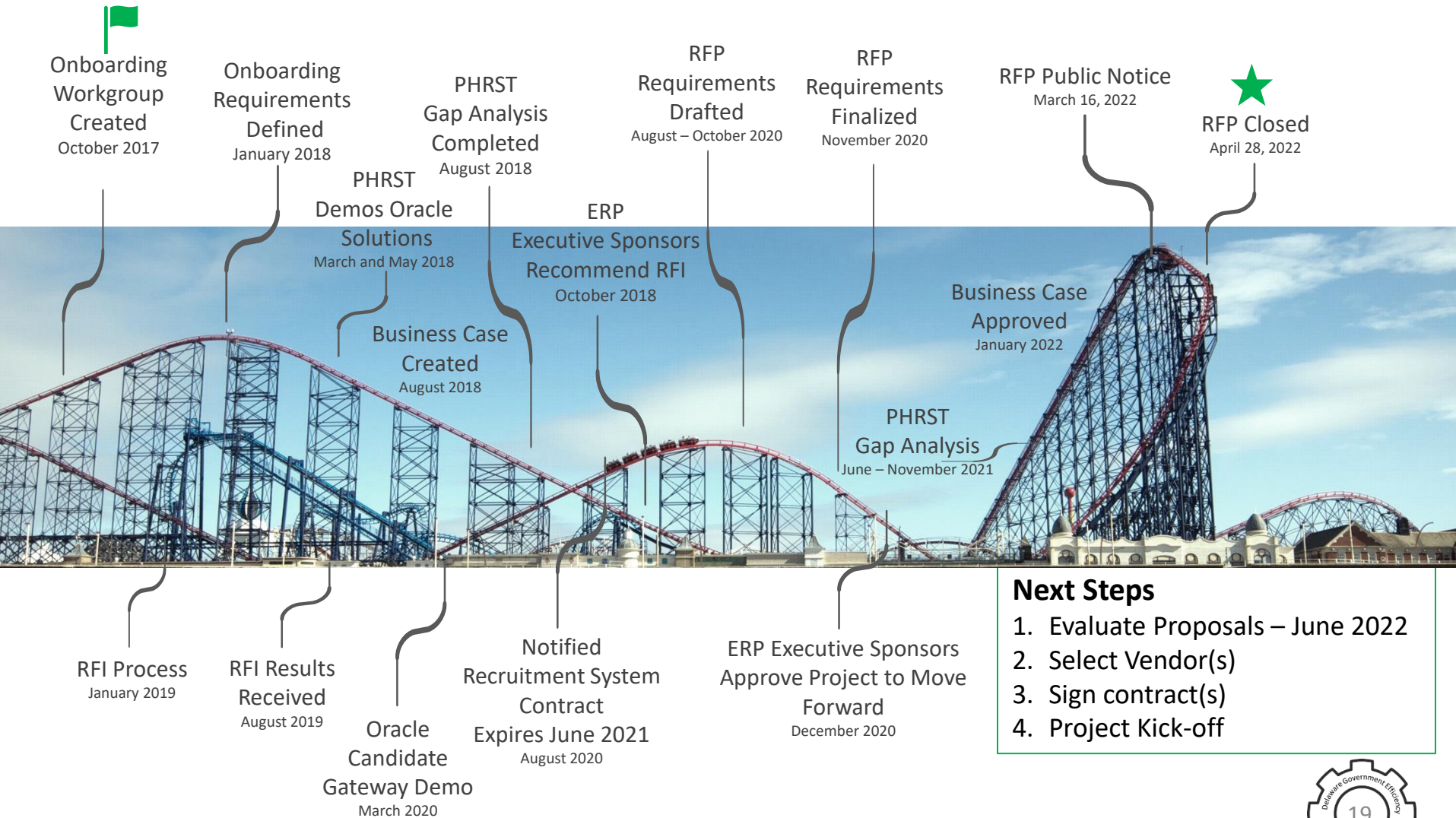


Hiring, Onboarding, and Offboarding Future State

- Solution that expands capabilities to manage the hiring process from posting vacancies to sending offer letters to candidates.
- Seamless onboarding and offboarding capabilities to provide a centralized and standardized process triggered by the hiring and separation processes.
- Enables interface with Okta for identity proofing and employment verification and Delaware Learning Center for training.
- Connect, standardized, streamline, and automate disparate process workflows for recruitment, hiring, onboarding and offboarding.

Classification, Recruitment, Onboarding and Offboarding Solution(s)

Progress and Next Steps



- Next Steps**
1. Evaluate Proposals – June 2022
 2. Select Vendor(s)
 3. Sign contract(s)
 4. Project Kick-off

Classification, Recruitment, Onboarding and Offboarding Solution(s)

Considerations



Process Optimization

Mapping and creating standardized processes with trained facilitator.



State of the art, Classification, Recruitment, Hiring, Onboarding and Offboarding solution

Provide solution(s) with seamless process for users from applying for vacancies to hiring through onboarding and offboarding. With the goal to improve the time to fill vacancies, provide standardized and centralized onboarding, and reduce risks to the State.



Governance

Ensure solutions are managed in accordance with statutes and are easy for applicants and HR to use.

Classification, Recruitment, Onboarding and Offboarding Solution(s)

Challenges and Solutions



Challenges

Finding the best solution to meet the comprehensive needs.

Project timeline

Interfaces with PHRST restricted requiring manual data entry by HR staff for new hires.



Solutions

Robust requirements and RFP proposal review process to secure the best solution(s) for the State.

Apply sound project management principles during requirements gathering, RFP process, and implementation.

Creative problem-solving and use tools available to maintain security of PHRST while looking for automated solutions for data entry.

Classification, Recruitment, Onboarding and Offboarding Solution(s)

GEAR Board Request

Support DHR's requests to deliver centralized HR services efficiently, effectively, and with accounting, including DHR's recent American Rescue Plan Act (ARPA) request and DTI funding for HR technology.

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

Overview

- Considering the widespread nature and use of Geographic information systems it was important to get this data updated. In coordination with the Department of Technology and Innovation (DTI) and Office of State Planning Coordination (OSPC) we were able to successfully complete an RFP, secure ARPA funding and award a contract in support of Aerial Imagery & Land use Land Cover.

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

Overview



- Geographic Information Systems (GIS) are computer programs that are designed to create, manage and maintain spatial information.
- GIS is widespread and used by more than 15 Departments and Divisions throughout all of Delaware.

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

In Progress

- RFP was awarded to Sanborn.
- ARPA funding secured for one-time collection for Imagery, LULC and LiDAR.
- Aerial Imagery Photography acquisition flow In March- Completed.
- Collection / Control points – In Progress.
- Vendor QC – In Progress.

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

Next Steps

- Orthoimagery Production – Estimated August 2022
- Initial Ortho Imagery to state – Estimated September 2022
- Land Use/Land Cover Production – Estimated November 2022
- Land Use/Land Cover Delivery to state – Estimated December 2022
- Work with DGS to collect LiDAR
 - Will need to submit for supplemental Grant, fall 2022

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

Challenges

- Last time this data was acquired was in 2017
 - This does not offer decision makers the ability to see more accurate developments and conditions.
- Funding source/acquisition
 - Funds had to be acquired by DTI and were secured through ARPA funding.
 - Funding source has always been pooled funds and challenging.
 - Due to the nature of the funds, we did not have a very large window to give vendor NTP and collect the imagery for 2022.
- Diverse agency requirements and needs
 - Considering this is statewide Imagery there are many different needs of other agencies, It was imperative to include stakeholders from these agencies in the RFP discussion to ensure vendors could meet and offer solutions for those needs.

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- Auburn Valley State Park 2017



Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- Auburn Valley State Park 2022 (Unprocessed imagery)



Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- Little Heaven realignment 2017



Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- Little Heaven realignment 2022 (Unprocessed imagery)



Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- PLUS 2011-12-02 (2017 Imagery)



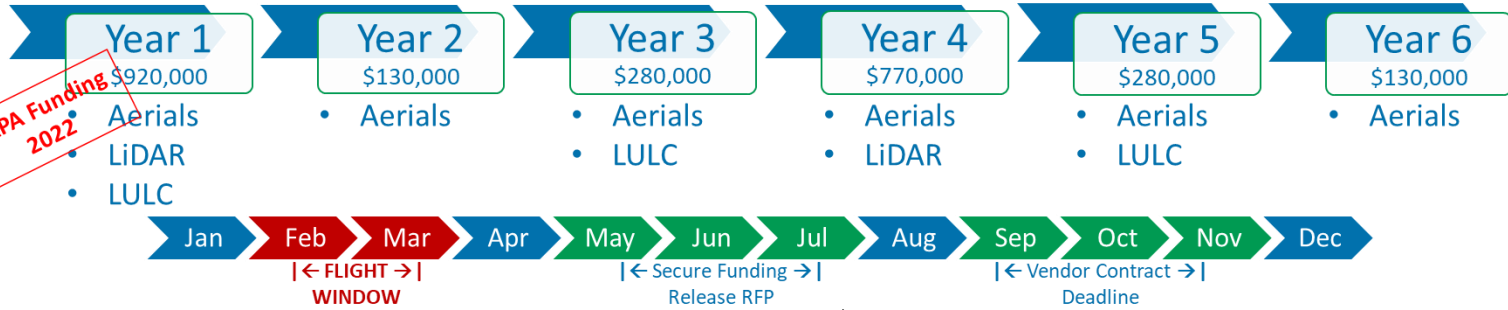
Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

- PLUS 2011-12-02 (2022 Unprocessed imagery)



Sample Data Collection Timeline for a 6-year contract (~\$2,510,000 or \$420k per year)

ARPA Funding
2022



Estimated Costs	
Imagery:	\$130,000
LiDAR:	\$640,000
LULC:	\$150,000
Total:	\$920,000

Last Refresh: 2017

Key Accomplishments

- ✓ Voted to recommend establishing a position of Geographic Information Officer (GIO) for coordination and governance of GIS technology, including imagery
- ✓ Acquired ARPA funding to establish a current (Year 1) baseline for all datasets

Next Steps

- Complete flyovers and refresh datasets
- Decision on recommending an annual fund to keep datasets current (~\$420K/Yr.)
- Acquire/fill GIO Position

GIO Value / Key Deliverables

- Develop a statewide **GIS Technology strategic plan**, positioning agencies and entities to use data collaboratively and strategically
- Align standards and requirements amongst agencies to **enable flyover contracts to be consolidated**, and reduce/eliminate agency specific flyovers
- Develop/**manage GIS budget**, including imagery, and foster an ongoing relationship with IT System and Flyover vendors
- Ensure collaboration with the Office of State Planning Coordination (OSPC) to **align technology/imagery governance with OSPC-led governance** of agency, county, municipality use of GIS systems and imagery

Aerial Imagery & Land Use Land Cover (OMB21-GISDATA)

GEAR Board Requests

- Support creation of a funding source to cover dedicated collection
 - Establishing this funding source would ensure more accurate data available to data managers and decision makers.
 - If this were a routine collection stakeholders would be guaranteed data acquisition and would be more inclined to participate in one focused effort rather than individualized data acquisition.
 - Would not put decision makers at risk while making real time decisions with outdated data.
 - More accurate data would save operating expenses of the need for site visits.
- Support the establishment of a GIO position
 - Establishing a GIO position was recommended by UD IPA. This would help to focus collection efforts. 40 Formal GIO's established in other states.

Space Planning Memo

Space Planning Memo



SPACE PLANNING MEMO

mb OFFICE OF
management
+ budget

Space Planning Memo

- On April 14, 2022, Director Cade sent out a memo to all Cabinet Secretaries that OMB would like for all agencies, who are requesting additional space, to conduct a Space Utilization Study in conjunction with Facilities Management Office to evaluate the agency's current workspace.
- Over the last couple of years, we have noticed an increase in space needs within State agencies.
- In addition, we are trying to decrease our leased space footprint within the State.

Space Utilization Study Defined

- **What is a Space Utilization Study?**

Space Utilization Study Defined



A Space Utilization Study looks at how well an organization is utilizing their space.

Space Utilization Study Steps

STEPS TO A SPACE UTILIZATION STUDY

1. Space Utilization Study is performed by an A/E firm

2. Look at existing floorplans

3. Schedule a visual walk through of the area

4. Identify each use of space and what it is used for

5. Generating surveys/questionnaires to staff

6. Comprehensive Space Analysis Report is generated

7. Look at deficiencies/space needs

This process takes approximately 4 weeks to complete, from start to finish



Space Analysis Report

- Regardless of what the Space Analysis Report comes back as, it will set up the next steps in determining if the agency has space needs that are deficient, or underutilized.

Questions

- Any questions for clarification?

Deep Dives

GEAR Field Team

GFT Deep Dive Project Presentations

1. DSAAPD Training Unit Re-Organization **Rudy Bailey, DHSS**
2. State Service Centers Reimagined **Brian Calio, DHSS**
3. OST Merchant Services PCI Compliance Project **Deanna Bledsoe, OST/DTI**

DSAAPD Training Unit Re-Organization

Division of Aging Adults w/Physical Disabilities



Process improvement reimagination project on how training is being offered to division-wide employees

Rudy Bailey, MBA, CCP
DSAAPD Training Administrator II

Project Overview

Project	Purpose Rationale for Project	Particular Targets of Change	People
<p>1. Increase utilization of voluntary training events.</p> <p>2. Improve the design and program delivery of DSAAPD-specific training course offerings and training unit capacity to serve all levels of employees.</p>	<p>Mandatory trainings are based on topics dictated by outside agencies.</p>	<p>1. Attitude toward the importance of training</p>	<p>Division-wide</p>
	<p>Voluntary trainings are underutilized but are just as important and can actually help prevent the need for some mandatory trainings.</p>	<p>2. How topics are chosen and planned</p>	
	<p>Topics covered in voluntary events can build a stronger workforce with increased sense of professional efficacy and a better professional quality of life.</p>	<p>3. Types of trainings offered</p>	
		<p>4. Communication about what's available</p>	

Project in Process

- *What is being done currently, to advance this project?*
- The Project successfully launched January 18, 2022
- Noticeable increased employee participation
- Significant program workflow efficiencies seen in process automation leveraging the Delaware Learning Center.

Health and Community Support Services Certificate Program

Personal Development/Today's DSAAPD Employee Growth Track		
Title	Format	Length
<i>DSAAPD Customer Service</i>	Virtual via Zoom	1 hour
<i>The Power of You! Employee Engagement</i>	Virtual via Zoom	1 hour
<i>Understanding and Application of Your Learning Style</i>	Virtual via Zoom	1 hour
<i>Sensitivity Awareness: Effective Communication Strategies for Today's DSAAPD Employees</i>	Virtual via Zoom	1 hour
<i>Understanding Workplace Culture/Diversity</i>	Virtual via Zoom	1 hour
Total		5 hours

Human Services Growth Track		
Title	Format	Length
<i>Professional and Ethical Boundaries</i>	Virtual via Zoom	1 hour
<i>Trauma Informed Approach in Client Services</i>	Virtual via Zoom	1 hour
<i>Effective Techniques for Interviewing Clients</i>	Virtual via Zoom	1 hour
<i>Best Practices in Case Documentation</i>	Virtual via Zoom	1 hour
<i>Increasing your Productivity Through Effective Time Management</i>	Virtual via Zoom	1 hour
Total		5 hours

The Aging Process/Physical Disabilities Growth Track		
Title	Format	Length
<i>The Aging Process</i>	Virtual via Zoom	1 hour
<i>Self-Managing Your Health</i>	Virtual via Zoom	1 hour
<i>Understanding Hoarding Behavior in Older Adults</i>	Virtual via Zoom	1 hour
<i>Understanding Developmental Disabilities</i>	Virtual via Zoom	1 hour
<i>The Unique Role of a Caregiver: An Overview</i>	Virtual via Zoom	1 hour
Total		5 hours

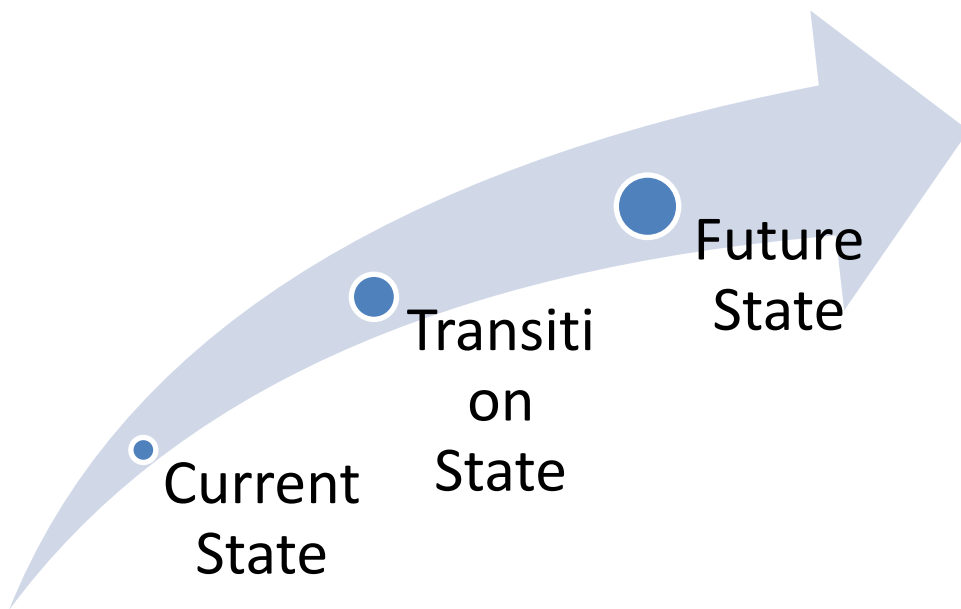
Total Hours: 15

Next Steps

What are the next steps in the process to be undertaken (and when are these steps going to be taken)?

Training Revamp Project

RAISE-IT - Reform Alignment & Intrinsic Staff Engagement in Training



Particular Targets of Change
1. Cultivate an Improved perception/attitude towards the importance of training and continuous learning.
2. Successful implementation of DSAAPD –centric “Growth Tracks”.
3. Strengthen training unit’s capacity to meet DSAAPD training needs and support various strategic organizational/change management initiatives.

Challenges

What are potential obstacles to the next steps or to the project as a whole?

- 1) Overall project health (GREEN) with solutions identified and without barriers.
- 2) Counteracting organizational culture and workflow issues.
- 3) Acceptance and Implementation across the Division.

GEAR Board

What, if anything, does the project need or want from the GEAR Board that will help make this project succeed?

- Awareness - No needs from the GEAR Board
- Implementation responsibility is within the DSAAPD Training Unit to carry forward project goals.

State Service Centers Reimagined

Brian Calio

May 18, 2022



<https://gear.delaware.gov/>⁵³

Overview – State Service Centers Reimagined

- DHSS operates 14 State service centers
- Centers are places where citizens can apply for help, such as the food supplement program, general assistance, temporary assistance, refugee cash assistance, Medicaid, and health insurance
- Centers are spread throughout the State



Overview – State Service Centers Reimagined

- There has been a thought brewing among some staff that the service centers could do a better job delivering services
- Staff were surveyed for their insights on how we could improve service delivery
- Responses were gathered and reported
- Target areas of focus were identified
- Project or Program

Progress – State Service Centers Reimagined

Done:

- ✓ Formed a Project Team
- ✓ PM methodology
- ✓ Focus areas identified
- ✓ Assigned and sequenced the tasks

PROJECT CHARTER		
Project Name	Project Sponsor	Project Manager
State Service Centers Reimagination	Daniel Walker	Brian Calio
Project Concept / Mission		
The project mission is to improve the client experience when visiting a State Service Center (SSC).		
Project Purpose / Description		
Opportunities exist to improve the client experience while visiting SSCs. This is consistent with the DHSS strategic plan and the suggestion to improve service delivery through a "person centered" model. The goals include improving public health and safety infrastructure, building, aligning, and strengthening the DHSS workforce, enhancing and integrating data, promoting inclusive and routine communication, and strengthening the Department-wide planning structure. These values will guide the DHSS approach to an enhanced client service model.		
Scope (What is in and not in scope)		
DHSS State Service Centers, the staff that work there, including staff from the Division of State Service Centers (DSSC) and the Division of Social Services (DSS). The five areas of focus are: 1. Client service delivery 2. Employees 3. Technology 4. Facilities 5. Meeting evolving client needs		
Key Deliverables		
<ol style="list-style-type: none"> 1. Create current state process maps 2. Create future state process maps 3. Changes to the DHSS website to improve navigation and service delivery 4. Reinstate original State Service Center practice that client cases are not transferred outside of their normal local physical location. 5. Create a customized trauma-informed communication toolkit for all employees who have direct contact with clients. 6. Conduct a review of service offerings at each facility, by all providers, to ensure that there is a core set of services offered consistently at each facility. 7. Translate ALL information required to obtain services into the top four languages spoken in the state 8. Consolidate front desk services and add a triage process. 9. Change the flow of client service in the Centers so that armed law enforcement officers are not the initial person clients greet. 10. Ensure that the consolidated help desk employee(s) are trained in all areas of services provided at the Center. 11. Make a tablet or mobile device available to all clients in Center lobbies. 12. Train employees to utilize translation services. 13. Undertake a detailed and intensive process with a goal towards creating a streamlined intake process in which clients answer only a few basic, uniform questions. 14. Reduce or eliminate redundant requirements for client documentation for services from State Service Center Services and Social Services. 15. Streamline all service offerings into one easy to use checklist interactive service. 16. Prioritize hiring of bi-lingual employees 		

Objectives	
Initial Budget (if applicable)	budget for this project except for the time invested by staff
Timeline (top 3-5)	improve the service delivery will yield a degradation of service instead of an improvement of service service seekers will be unduly burdened while seeking services reject proposed changes
Resources (top 3-5)	resources available to meet and contribute to ideas leading to improvements in service delivery contribute accept proposed changes to service delivery model
Completion Criteria (Definition of Success)	project is complete when sufficient progress has been made toward the suggested project goals that additional resources to it is determined to be a waste of resources. When enough of the project goals have been met at devoting more resources to unmet goals is unappealing and wasteful, the project is complete.
Stakeholders	Organization Contact Information
Chief of Staff	DHSS OSEC 302.255.9036
Deputy Chief of Staff	DHSS OSEC 302.255.9051
Chanda Jackson	DHSS DSAAPD Family Services Cabinet Council 302.255.9372
Brian Calio	DHSS OSEC 302.255.9260
Emmanuel Oppong Adjey	DHSS DPH 302.283.7302

WBS NUMBER	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION	% of TASK COMPLETE	Progress Bar											
1	Project Initiation						Progress Bar											
2	Project Charter	Calio	4/25/2022		-44676	10%	Progress Bar											
3	Stakeholders	Calio	4/25/2022	4/25/2022	0	100%	Progress Bar											
4					0	0%	Progress Bar											
5	Project Planning						Progress Bar											
6	Scope & Goal Setting	Calio	4/25/2022	4/25/2022	0	100%	Progress Bar											
7	Set up MS TEAMS	Calio	4/25/2022		-44676	10%	Progress Bar											
8					0	0%	Progress Bar											

WBS NUMBER	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION	% of TASK COMPLETE	Progress Bar											
10	Project Execution						Progress Bar											
11	Client Service						Progress Bar											
12	Conduct a comprehensive review of the DHSS website as it relates to services provided through the State Service Centers. Simplify the current extremely complicated and difficult to navigate website.	Walker	20		0	0%	Progress Bar											
13	Reinstate original State Service Center practice that client cases are not transferred outside of their normal local physical location.	Walker	21		0	0%	Progress Bar											
14	Create a customized trauma-informed communication toolkit for all employees who have direct contact with clients.	Walker Jackson	22		0	0%	Progress Bar											
15	Conduct a review of service offerings at each facility, by all providers, to ensure that there is a core set of services offered consistently at each facility.	Social Contact	23		0	0%	Progress Bar											
16	Translate ALL information required to obtain services into the top four languages spoken in the state (Spanish, Haitian Creole, Korean and Chinese). If all translations cannot happen within the short-term, they should be prioritized based on the percentage of the population in Delaware that speak the language.	Jackson	24		0	0%	Progress Bar											

WBS NUMBER	TASK TITLE	TASK OWNER	START DATE	DUE DATE	DURATION	% of TASK COMPLETE	Progress Bar											
74	Technology						Progress Bar											
75	Ensure that each employee has a desktop that is up to date with dual monitors (update all computers older than 5 years, and then update 20% annually).	Walker, Clancy			0	0%	Progress Bar											
76	Merge the CAPS system with the ASSIST System and allow for the use of the existing document imaging/management process for both divisions.	Walker, Clancy, (+ working group)			0	0%	Progress Bar											
77	DSS is joining other divisions in a document imaging RFP. Consideration for DSSC is needed depending on available resources.	Walker			0	0%	Progress Bar											
78	Provide new headsets and new office phones for all employees that need them	Walker			0	0%	Progress Bar											
79	Review and ensure access to data systems is accurately and appropriately authorized to full-time employees.	Walker			0	0%	Progress Bar											
80	Ensure that each employee that conducts either field work or intake in person has a portable device (laptop or tablet) to be able to conduct their work in real time	?			0	0%	Progress Bar											
81	Leverage televisions in the lobby to share information about service offerings. Each facility can scroll and market up-to-date information on service offerings. Leverage the information from service offerings, intake questions, and window/door flyers.	Jackson			0	0%	Progress Bar											
82	Modernize the existing system or leverage the state-owned and operated Enterprise Voice Services System and IT Services to ensure up-to-date equipment and systems.	Clancy			0	0%	Progress Bar											
83	Consider the creation of a mobile app that would provide interactive services for clients and community members.	?			0	0%	Progress Bar											

Next Steps – State Service Centers Reimagined

- Continue to build out the Project Plan
- Assign and Sequence open tasks
- Complete each task
- Document the current state and future state process maps

Challenges – State Service Centers Reimagined

- This project scope includes just DHSS. At some point a decision will be made to broaden that scope to other Departments.
- What will trigger that decision point?
- What other Departments will be asked to join the project (program)?

GEAR Board Ask – State Service Centers Reimagined

Expand and Elevate CIP

Thank you!

Brian Calio
DHSS OSEC Admin
Office 302.255.9260



OST Merchant Services PCI Compliance Project

Deanna Bledsoe

May 18, 2022



Overview – PCI DSS Compliance



What is PCI DSS Compliance?

- PCI = Payment Card Industry
- DSS = Data Security Standards

Security standards formed in 2004 by the 5 major credit card brands (Visa, MasterCard, Discover, JCB, Amex)



Overview – PCI DSS Compliance



Who is required to comply?

- All merchants who handle cardholder data
 - Process
 - Transmit
 - Store

Your PCI DSS Level determines your Compliance Difficulty



Merchant Level

Level 1

Level 2

Level 3

Level 4

of Annual Transactions

> 6M

1-6M

20k-1M

<20k

Difficulty to Complete

Very High

High

Moderate

Low



Overview – PCI DSS Compliance

As a Level 2 Merchant, we are required to

- Complete annual SAQ
- Quarterly Scans by an ASV
- Complete AOC

What is an SAQ? **S**elf **A**ssessment **Q**uestionnaire

Type	Description	# Questions
A	3 rd party e-commerce - outsourced	24
A-EP	Direct post e-commerce – merchant payment form	191
B	Phone, fax, imprint machine	41
B-IP	Internet terminal, network isolated	86
C	Payment system connect to internet	160
C-VT	VT on isolated network at one location	83
D	E-commerce w/o direct post or stores CHD	329
P2PE	Point-to-point encrypted payment device	33



Overview – PCI DSS Compliance



We have 200+ Merchants

- Each merchant must complete the SAQ appropriate for their payment environment
- SAQ is pass/fail
- The individual SAQs roll up into one SAQ that is completed for the entire state when we submit our AOC



Overview – PCI DSS Compliance



Penalties for non-compliance

- Fines
 - Months 1-3 \$5k/month
 - Months 4-6 \$25k/month
 - Months 7+ \$50k/month
- Data breach - \$MM in potential costs for remediation and credit monitoring
- Revoked right to process transactions
- Liability Claims
- Reputation





Progress – PCI DSS Compliance

We've accomplished:

- Merchant Surveys
- Review of payment environments
- Implementing standardized policies, procedures, best practices
- Reducing our PCI scope
 - SAQ A
 - SAQ P2PE
- Quarterly Network Scans
 - Ongoing remediation
- PCI training for business staff
- PCI training for IT staff
- Proactively tracking new projects that will have a payment component

SAQ A	3 rd party e-commerce	24
SAQ A-EP	Direct post e-commerce	191
SAQ B	Phone, fax, imprint machine	41
B-IP	Internet terminal, network isolated	86
C	Payment system connect to internet	160
C-VT	VT on isolated network at one location	83
D	E-commerce w/o direct post	329
P2PE	Point-to-point encrypted payment device	33

Next Steps – PCI DSS Compliance



Moving forward:

- Continue meeting with Merchants to understand business needs
 - Merchant Survey reviews
 - On-site visits with our QSA
- Continue to reduce PCI Scope
 - Modify the way that agencies handle payments
 - Implement new Payment Gateway(s)
 - Replace POS devices with P2PE devices
- Workshops to complete SAQs
- Integrating ACH data security components
- Working with DTI's Partner Services Engagement Team to help spread the word to agency IRMs

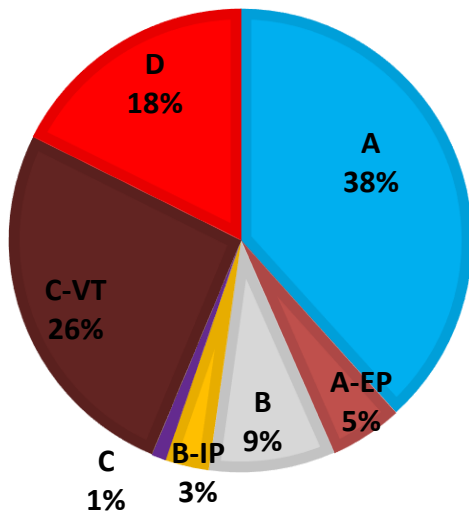
Next Steps – PCI DSS Compliance



- Continuing to reduce PCI DSS Scope

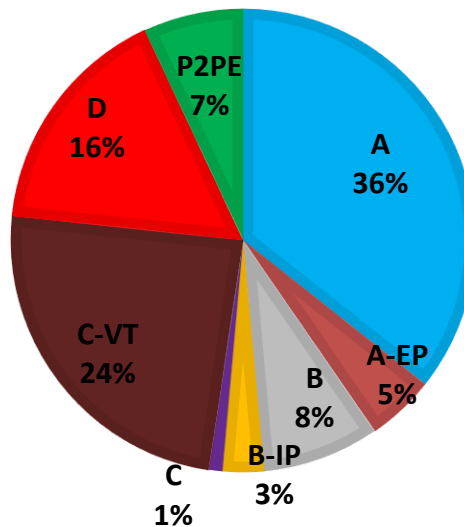
PAST

■ A ■ A-EP ■ B ■ B-IP ■ C ■ C-VT ■ D ■ P2PE



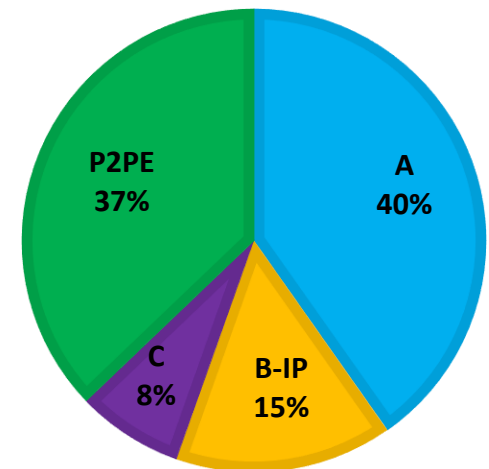
PRESENT

■ A ■ A-EP ■ B ■ B-IP ■ C ■ C-VT ■ D ■ P2PE



FUTURE

■ A ■ B-IP ■ C ■ P2PE



Challenges – PCI DSS Compliance



Challenges we've faced:

- Aligning work efforts with agencies
- Technical complexity of payment environments
- Obtaining P2PE devices
- Tight timeline; PCI Compliance deadline is March 31, 2023
- Sheer volume of work
- Prioritizing data security along with digital government modernization



GEAR Board Ask – PCI DSS Compliance



- Raise awareness of our PCI DSS Compliance efforts
 - Reduce scope
 - Use Point-to-point encrypted point of sales devices
 - Do not store cardholder data
 - Do not email cardholder data (ever)
 - Do not print or display cardholder data that is not properly masked
 - Outsource payment pages on websites/web apps
 - Follow best practice guidance given by OST and DTI
- Continue promoting Continuous Improvement Process efforts across the State

- **Open Topics Discussion – Board**
- **Public Comment**

Adjourn



Contact



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