

# Government Efficiency and Accountability Review (GEAR)

GEAR44 Board Meeting  
December 10<sup>th</sup>, 2024



# Agenda

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15 min

1. Introductions/Roll Call
2. Old Business
  - Review and Approve Minutes
  - 2024 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

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## Roll Call

# Old Business

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## Review/Approve Minutes from Prior Board meeting

*Final draft version sent to Board for review **December 3rd, 2024***



# Old Business

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## 2024 GEAR Board Schedule

| Location   | Date  | *Time                 |
|--|---|-----------------------|
| Carvel/Virtual   | <del>Tuesday, January 9th</del>   | <del>10:00 a.m.</del> |
| Carvel/Virtual   | <del>Tuesday, March 12<sup>th</sup></del>   | <del>10:00 a.m.</del> |
| <del>Haslet/In Person/Virtual</del>                      | <del>Tuesday, May 7<sup>th</sup></del>  | <del>10:00 a.m.</del> |
| Carvel/Virtual   | <del>Tuesday, July 9<sup>th</sup></del>   | <del>10:00 a.m.</del> |
| <del>Blue Ball Barn (North<br/>Wilmington Rt. 202)</del> | <del>Tuesday, October 15<sup>th</sup></del><br><del>(Approve 2024 GEAR Annual Report)</del> | <del>10:00 a.m.</del> |
| Carvel/Virtual   | Tuesday, December 10th  | 10:00 a.m.            |

Detailed information will be provided prior to meeting date.

Please contact Bobbi DiVirgilio at 302-577-8546 or [bobbi.divirgilio@delaware.gov](mailto:bobbi.divirgilio@delaware.gov) for more information



# New Business

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- 2025 GEAR Board Meeting Schedule (proposed)
- GEAR P3 Taskforce
- GEAR Continuous Improvement Classifications
- GEAR Continuous Improvement Cycle Updates
- GEAR Annual Report Publication
- GEAR Portfolio and Enterprise Service Delivery Updates

# New Business

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## 2025 Board Meeting Schedule (proposed)

- Tuesday March 4 10:00 a.m.
- Tuesday May 6 10:00 a.m.
- Tuesday July 15 10:00 a.m.
- Tuesday Sept 16 10:00 a.m.
- Tuesday November 18 10:00 a.m.
  - Approve 2025 GEAR Annual Report

# **GEAR P3 Taskforce Meeting Overview – November 21<sup>st</sup>**

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- **Update on GEAR P3 Innovation & Efficiency Awards - Ernie**
- **Ready in Six (Ri6) – Update - Chuck/Dan**
  - **Aspirational, Strategic, Tactical – Ri6 is Strategic**
  - **P3 Update**
    - **DNREC Pilot**
    - **DelDOT Pilot**
- **Review the GEAR Continuous Improvement Cycle – Chuck**
  - **Enterprise Services Delivery Team**
  - **GEAR Field Team**
  
- **High level review of GEAR Annual Report Overview – Chuck/Dan**
  - **Where to find GEAR Annual Report**
  - **P3 Contents – Awards, Ri6, etc.**
- **Action Items moving forward – Ernie Dianastasis**



# Themes and Recommendations from the P3 Taskforce

## 1. Expand Capacity for Continuous Improvement by Ensuring Governor's Cabinet prioritizes GEAR's continuation

- Continue the journey in building ROI estimates.
- Build capacity for process improvement within specific State functions by reducing duplication of effort and silos.
- Identify \$50M of cost reduction out of a \$6.1B budget, not just saving/repurposing funds by engaging all Cabinet members.
- Implement data dashboard containing KPIs and achievement against measurable goals.

## 2. Enhance Economic Development and Achieve a Real Ready in Six

- Need counties and municipalities involved.
- Provide predictable timelines to the private sector for business permitting.
- Develop and maintain connection to the Delaware Business Roundtable leadership.
- Consider changes to Title 22 and Title 9 to regulate zoning differently.
- Work on streamlining the permitting processes with the counties and Levy Court system.
- Expand # of engineering professionals/resources in State agencies and to contract with.
- Double down on site-readiness activities.
- Continue with the economic development ombudsman role in the Governor's office.
- Consider programs where businesses would be willing to pay for expedited services (i.e., "fast track").
- Focus on the nimble story in Delaware to attract businesses - not the large \$ story.
- Track legislation that will work against business permitting optimization.

## 3. Other P3 Priorities

- Identify areas like affordable housing, clean energy, health equity and educational efficiencies
- Review opportunities to enhance workforce development - align training with employers that are ready to hire in specific fields.
- Build utility connections and capacity. The real problem is not how fast we can build solar, it is the capacity to attach it to the grid.



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# Action Items Moving Forward - GEAR Goals for the Future

## Prototypes That Began in Current Administration

### *Ready in Six (Ri6) Advancement*

- *Double down on permitting process improvement opportunities (moving from prototypes to full scale Ri6 project across government agencies)*

## Next Administration

### *Business Process Optimization in State Government*

- *Build off the current \$100M in estimated ROI in savings – additional \$300M opportunity to optimize and reinvest government resources over the next four years*
- *Provide for fiscal stability within the State's ~\$6B budget*
- *Setting the foundation for leveraging technology advancement in generative AI and other emerging practices*

# Continuous Improvement Classifications Published As of September 1st

Alphabetical Listing | Career Ladder Listing

| Business Analyst Series |                                |           |             |
|-------------------------|--------------------------------|-----------|-------------|
| Jobcode                 | Business Analyst               | Pay Grade | Salary Plan |
| MAIA01                  | Business Analyst I             | 013       | M37         |
| MAIA02                  | Business Analyst II            | 016       | M37         |
| MAIA03                  | Business Analyst III           | 017       | M37         |
| MAIA04                  | Business Analyst Manager       | 019       | M37         |
| MAIA05                  | Business Analyst Administrator | 021       | M37         |

| Jobcode | Change Management                   | Pay Grade | Salary Plan |
|---------|-------------------------------------|-----------|-------------|
| MAID01  | Change Management Specialist I      | 015       | M37         |
| MAID02  | Change Management Specialist II     | 017       | M37         |
| MAID03  | Change Management Senior Specialist | 019       | M37         |

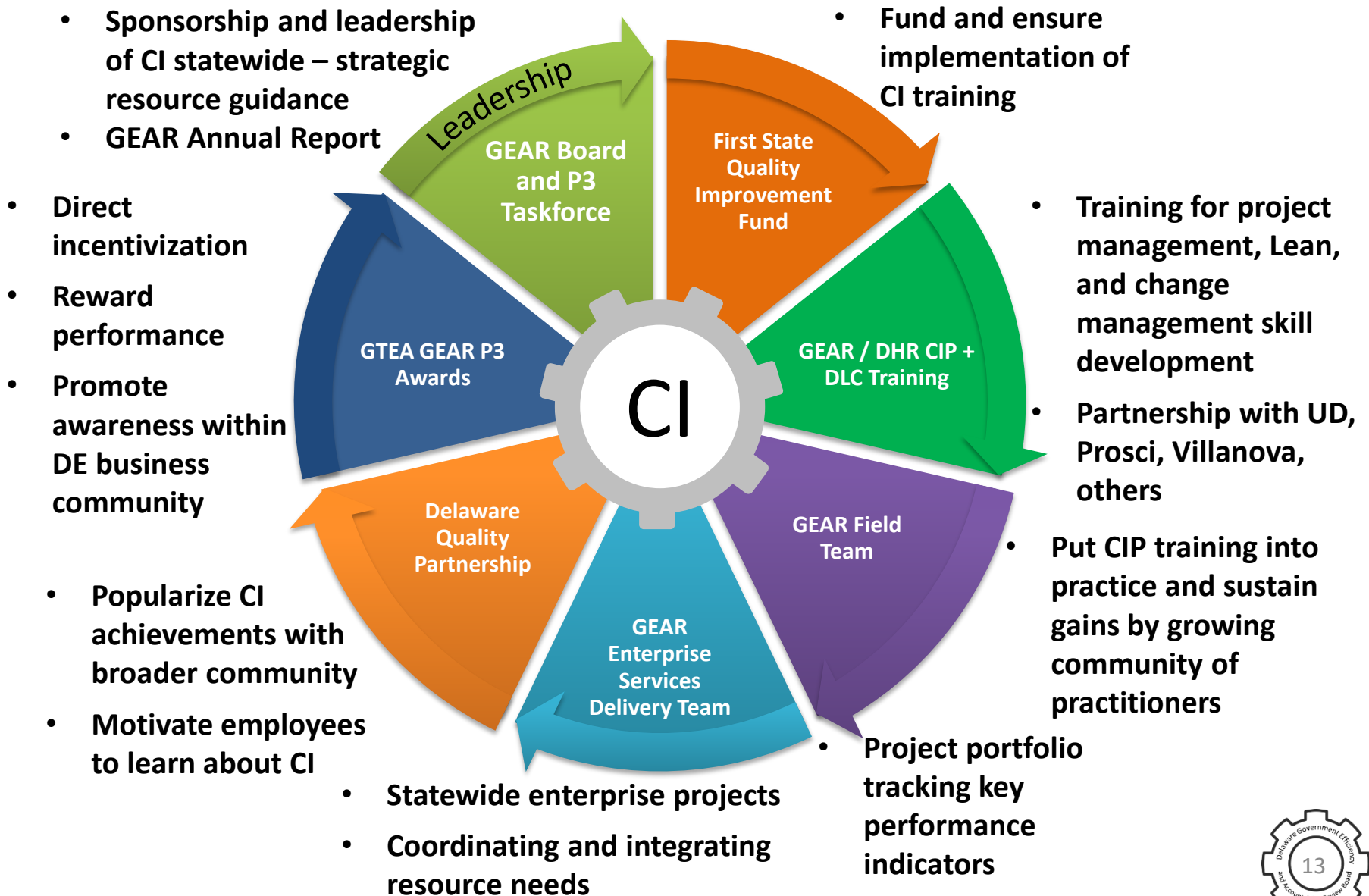
# Continuous Improvement Classifications

## Published As of September 1st

| Jobcode | Lean Continuous Improvement               | Pay Grade | Salary Plan |
|---------|---|-----------|-------------|
| MAIC01  | Lean Continuous Improvement Analyst I     | 013       | M37         |
| MAIC02  | Lean Continuous Improvement Analyst II    | 016       | M37         |
| MAIC03  | Lean Continuous Improvement Analyst III   | 017       | M37         |
| MAIC04  | Lean Continuous Improvement Manager       | 019       | M37         |
| MAIC05  | Lean Continuous Improvement Administrator | 021       | M37         |

| Jobcode | Project Manager       | Pay Grade | Salary Plan |
|---------|-----------------------|-----------|-------------|
| MAIB01  | Project Manager I     | 013       | M37         |
| MAIB02  | Project Manager II    | 016       | M37         |
| MAIB03  | Project Manager III   | 017       | M37         |
| MAIB04  | Project Manager IV    | 019       | M37         |
| MAIB05  | Project Administrator | 021       | M37         |

# GEAR Continuous Improvement (CI) Cycle

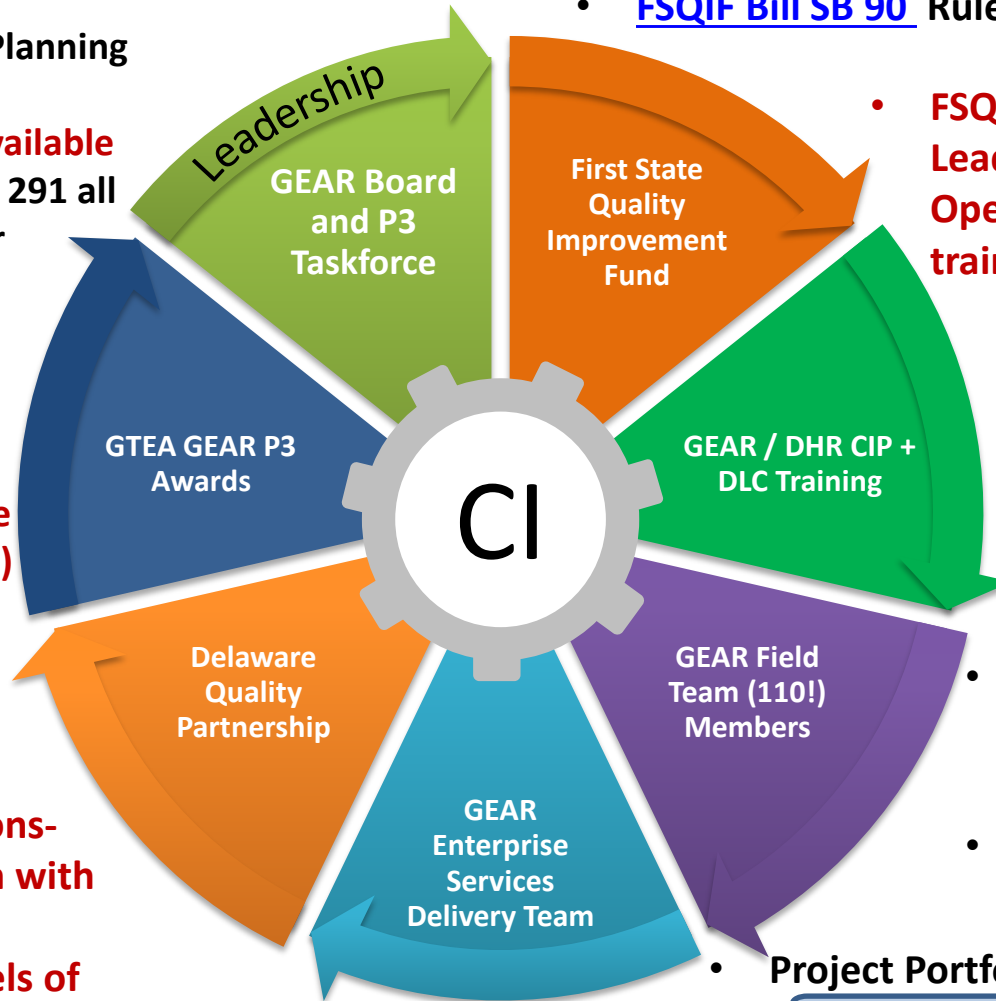


# Current GEAR CI Cycle Activities

- GEAR Review and Planning meetings complete
- **CI Classifications available**
- HB 333, HB 366, SB 291 all signed by Governor

- **GEAR P3 Taskforce meeting held 11/21/24**
- **Ri6- DNREC prototype (Subaqueous permits) DelDOT prototype (Utility regulation)**

- **DQP Presentations- Panel Discussion with GEAR P3 Award Winners – Models of Excellence 12/13/24**



- **FSQIF Bill SB 90 Rules and Guidelines (draft)**

- **FSQIF – Project and Process Leadership (PPL) and Operational Excellence (OpEx) training pilots underway**

- **CIP Cohort #8 – 20 in training, record # of applications (118 employees trained)**

- **Cohort #9 applications by 1/15/25**

- **Leveraged scalable Project Management tool in support of Annual Report**

- **~90% est. ROI participation rate**

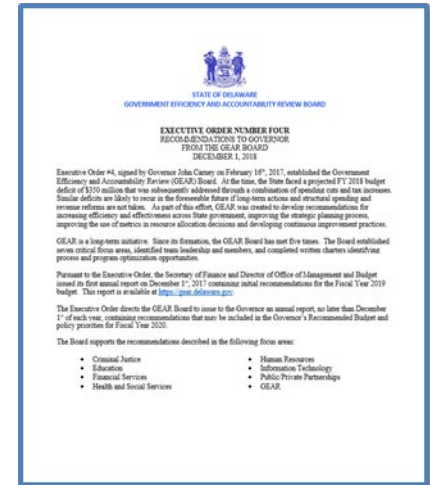
- **Project Portfolio (152 projects)**

- **Finalized project portfolio consolidation with full ESD team 11/19/24**




# GEAR Annual Report – 2024 Timeline

- 8th annual GEAR report
- Describes continuous improvement achievements, recommendations for the Governor
- Emphasis on quantifiable outcomes
- Narratives provided from all Board member agencies, ESD and GEAR Field Team organizations



## 2024 Schedule

- |   |   |
|---|---|
| May 1   | Annual report guidance distributed  |
| Aug 1   | All content contributions due from teams  |
| Oct 8   | Final draft emailed, Board reviews  |
| Oct 15  | GEAR Board review/approval  |
| Oct 21  | Final comments due from Board   |
| Oct 28  | Final version mailed to Board   |
| Nov 1   | <a href="#">Report posted on GEAR website</a>                                     |
|  Nov 12 | <a href="#">Press release</a> and <a href="#">Delaware Public Media interview</a> |

# GEAR Portfolio

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- 15 Agencies, Judicial Branch, Enterprise Services Delivery team represented in portfolio
- Key performance indicators captured in Planview Projectplace:
  - Project health across time, cost, and quality factors (assessed in green/yellow/red statuses to note deviations) – serves as a basis for risk assessment
  - Project lifecycle phases realigned with Project Management Institute (PMI) standards

# GEAR Portfolio Projects by Organization

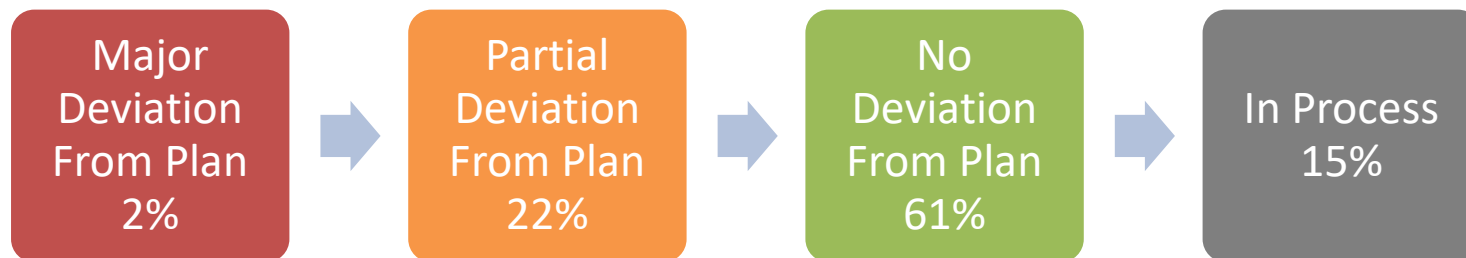
| Department   | Number of Projects |
|--|--------------------|
| Health and Social Services (DHSS)                      | 29                 |
| State (DOS)  | 6                  |
| Judicial   | 7                  |
| Education (DOE)  | 8                  |
| Natural Resources and Environmental Control (DNREC)    | 16                 |
| Services for Children Youth and their Families (DSCYF) | 7                  |
| Labor (DOL)  | 2                  |
| Correction (DOC)                                       | 1                  |
| Safety and Homeland Security (DSHS)                    | 8                  |
| *Enterprise Services Delivery (ESD)                    | <b>54</b>          |
| GEAR P3 (Public-Private Partnership)                   | 2                  |
| GEAR   | 10                 |
| State Housing Authority (DSHA)                         | 2                  |
| <b>Total</b>   | <b>152</b>         |

**\*Enterprise Services Delivery Team includes:**

- State Treasurer (OST)
- Finance (DOF)
- Technology and Information (DTI)
- Human Resources (DHR)
- Management and Budget (OMB)
- Auditor of Accounts (AOA)

# GEAR Portfolio Key Performance Indicators

| Project Phase                         | Number of Projects |
|---------------------------------------|--------------------|
| Initiating                            | 19                 |
| Planning                              | 11                 |
| Executing                             | 55                 |
| Monitoring/Controlling                | 5                  |
| Closing (Includes Measuring Outcomes) | 9                  |
| On Hold                               | 10                 |
| Closed                                | 43                 |



**Estimated ROI:**  
137 (90%) out of 152 projects reporting at \$102.6M

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# Enterprise Services Delivery (ESD) Team

# Enterprise Services Delivery Team – Full Team

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- **Goal for 2024:** Improve integration of project management elements so as to be truly enterprise-wide in outlook.
- **Mission:** Support, promote, monitor and strategically guide statewide, multi-organization, financial services, human resources and information technology projects to facilitate inter-organizational collaboration on these projects and elevate communication of project details and outcomes to stakeholders.
- **Activities Undertaken in 2024 include:**
  - Created charter with mission, vision, roles, guiding principles, stakeholders and tentative goals (working on developing specific objectives) to clarify ESD purpose, activities, and role within GEAR.
  - Confirmed and consolidated those projects ESD members are actively working on as well as those projects that have been completed or are now ongoing.
  - Monitored progress of projects, communicating progress or issues.
  - Identified ESD Interim Team to carry on ESD activities during the transition to the new administration.

# Enterprise Services Delivery Team – Full Team

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- **Project list Confirmation and Consolidation** The Enterprise Services Delivery Team is responsible for a number of projects in the GEAR Program Portfolio. ESD members worked to consolidate the list of ESD projects and separate them into two categories: active/ongoing and inactive/complete. Next step is to work on updating project statuses.
- **ESD Interim Team** During the transition between the Carney and Meyer Administrations ESD will have an interim team comprised of representatives from the finance, human resources and information technology sectors.
- **ESD Goals and Objectives** We will be returning in future meetings to address the details of the ESD goals approved in April (e.g., adding specific objectives).

# GEAR Deep Dive Project Presentations

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1. IRAS Project

**Jamie Johnstone, DOF/DOR**

2. Improve Response to  
External Inquiries

**Qazi Salahuddin, Anna Wicks,  
Sandy Woolston, DNREC**

# Deep Dive

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# Tax System Modernization

Integrated Revenue Administration System (IRAS)  
Department of Finance



# IRAS - Overview

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**Problem:** Delaware's revenue collection system was outdated, and this exposed the State to security risks and inefficiency in tax collection.

**Objectives:** Replace the existing system and improve security, scalability, and ease of use for customers and staff.

**Future State:** 90% of Revenues collections are now in the modernized system. This includes several new revenues not considered in project planning.

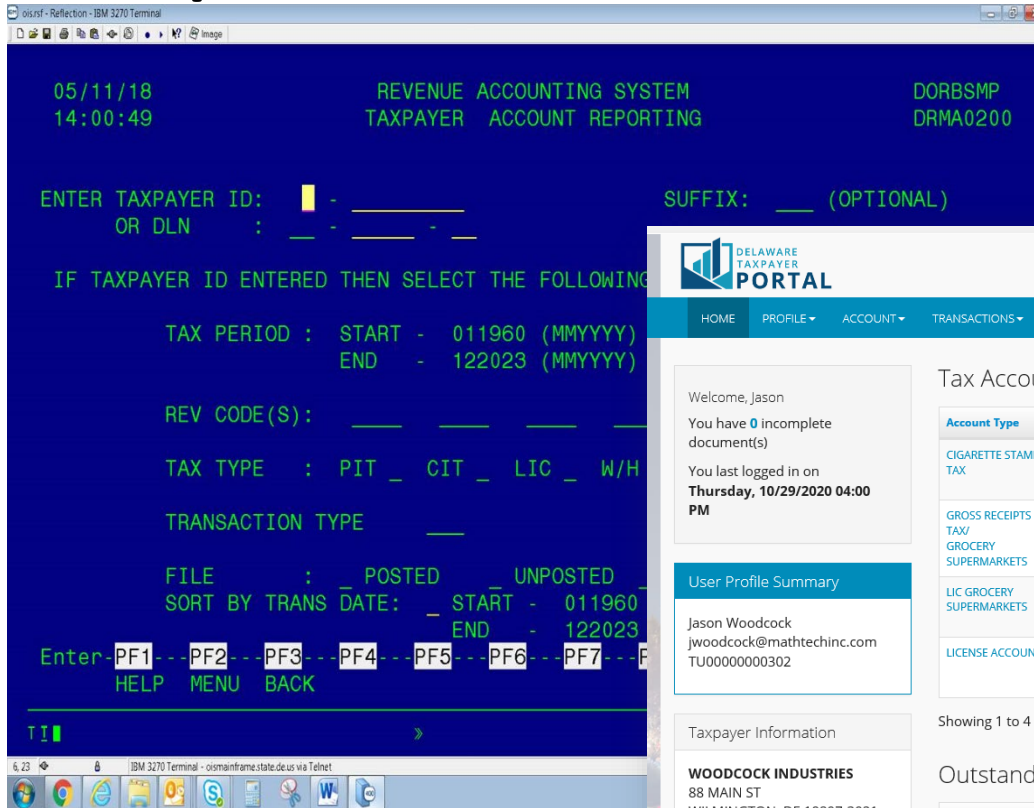
# A Tax Admin Platform for the Long Term

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*“An abundance of short-term technical decisions resulting in a collection of one-dimensional, thrifty solutions that do not soundly integrate across platforms”*

- The 30-year old mainframe technology was facing substantial cyber security, hardware scarcity, and technical knowledge challenges.
- A modern system needed to be implemented to:
  - Improve efficiency,
  - simplify customer facing elements,
  - provide security improvements, and
  - streamline annual changes and revenue opportunities.

# A picture worth 1,000 keystrokes



**DELaware TAXPAYER PORTAL**

Welcome, Jason  
You have 0 incomplete document(s)  
You last logged in on **Thursday, 10/29/2020 04:00 PM**

**User Profile Summary**

Jason Woodcock  
jwoodcock@mathtechinc.com  
TU00000000302

**Taxpayer Information**

**WOODCOCK INDUSTRIES**  
88 MAIN ST  
WILMINGTON, DE 19807-3021  
UNITED STATES

Select a Taxpayer

**Tax Accounts**

| Account Type                            | Account ID                 | Address   | Last Activity Date | Current Balance | Last Period Filed |
|---|----------------------------|---|--------------------|-----------------|-------------------|
| CIGARETTE STAMP TAX                     | DOR FILE NUMBER:x0126742-9 | 88 MAIN ST, WILMINGTON, DE 19807-3021 UNITED STATES | 10/13/2020         | \$1,333,332.37  | 10/12/2020        |
| GROSS RECEIPTS TAX/GROCERY SUPERMARKETS | DOR FILE NUMBER:x0126742-9 | 88 MAIN ST, WILMINGTON, DE 19807-3021 UNITED STATES | 10/14/2020         | \$5,138.78      | 06/30/2020        |
| LIC GROCERY SUPERMARKETS                | DOR FILE NUMBER:x0126742-9 | 88 MAIN ST, WILMINGTON, DE 19807-3021 UNITED STATES | 09/24/2020         | \$90.00         | 12/31/2020        |
| LICENSE ACCOUNT                         | DOR FILE NUMBER:x0126742-9 | 88 MAIN ST, WILMINGTON, DE 19807-3021 UNITED STATES | 09/24/2020         | \$0.00          |                   |

Showing 1 to 4 of 4 entries

**Outstanding Debts**

| Account Type                            | Account ID                 | Period End Date | Balance        | Status |
|---|----------------------------|-----------------|----------------|--------|
| LIC GROCERY SUPERMARKETS                | DOR FILE NUMBER:x0126742-9 | 12/31/2020      | \$90.00        | ACTIVE |
| CIGARETTE STAMP TAX                     | DOR FILE NUMBER:x0126742-9 | 10/09/2020      | \$1,333,332.37 | ACTIVE |
| GROSS RECEIPTS TAX/GROCERY SUPERMARKETS | DOR FILE NUMBER:x0126742-9 | 06/30/2020      | \$2,554.80     | ACTIVE |
| GROSS RECEIPTS TAX/GROCERY SUPERMARKETS | DOR FILE NUMBER:x0126742-9 | 07/31/2019      | \$2,583.98     | ACTIVE |

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# IRAS - In Progress

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## Timeline

- Release 1 – Business Licenses and Gross Receipts Tax – live in November 2020
- Release 2 – Personal Income Tax – live in October 2022
- Release 3-A Marijuana Tax – live in June 2024
- Release 3 – Corporate Income Tax – live in November 2025

## Current State

- Secure Portal filing has enabled:
  - a 33% reduction in paper filing and
  - near real time access for taxpayers to their financial accounts
- Enhanced, upfront fraud scoring and W-2 and 1099R matching
- Mass bulk refund releases
- More than 200,000 PIT refunds are fraud scored and deposited without human review
- Real time processing results
- Near real time dashboard reports

# IRAS – What’s left to complete

## Process

- Currently final development phase in progress for corporate and passthrough entities.
- An Integrated Data Warehouse
- Standard audit workpapers and tracking system
- Complete retirement of 30 year-old mainframe system
- Organizational review of restructuring

## Future State

- More secure and safe
- Expanded portal services
- Single taxpayer view for customer and staff
- Expand fraud protections beyond just personal income tax
- Audit workpapers
- Automated correspondence
- Automated compliance programs
- Data analytics are used to make production and audit decisions

IRAS is done when all revenue collections are accounted first in IRAS and only IRAS. At that time, the portal will serve as the best source for taxpayer account status information.

# IRAS – Critical Success Factors

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- Team Capacity
  - Balancing modernization project readiness work with regular operational responsibilities and workload.
- Contractual Terms
  - Contract development needed to properly foresee the support needs for a future state with a modernized tax administration system.
- Project Plan
  - Utilize the agile process to ensure scope and implementation targets are met.
- Governance and Project Management
  - Work with Project Management Office to ensure project status remains on track, risk are identified timely, and DOR's best interest is preserved.

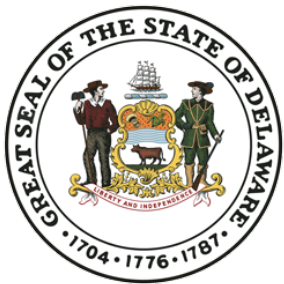
# How GEAR can help

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- **Support as the system matures**
  - Familiarity will allow optimization
  - Delaware specific refinement
  - Rhode Island and Phase 1 examples show long-term efficiency gains
- **Shared Feedback**
  - We particularly value public user feedback
  - Unique perspectives are crucial for enhancing functionality and user experience
- **Support Revenue's commitment to iterative improvement**
  - IRAS will enable modern collections for the next few decades and enables Revenue to be responsive to whatever changes that entails.

# IMPROVE RESPONSE TO EXTERNAL INQUIRIES

Qazi Salahuddin, Anna Wicks, Sandy  
Woolston  
DNREC Waste & Hazardous Substances  
Division



# Background

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## Overview

- The DNREC-Remediation Section (RS) receives inquiries from stakeholders regarding remediation and development of contaminated properties
- Currently, there is no standardized process for DNREC-RS staff and management to respond to these external inquiries
- This causes inconsistent and inadequate responses, taking longer turnaround time, which generates stakeholder complaints
- Why is this project important?
  - Keep stakeholders well informed
  - Reduce complaints and increase feedback
  - Achieve stakeholders' acceptance of the cleanup of contamination
- What is the significance of this project?
  - Build trust by responding consistently, adequately and rapidly
  - Reduce misinformation
  - Effectively protect human health and the environment

# Progress

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- What is completed on this project?
  - Identified the project, purpose, particulars and people involved (4 P's)
  - Clarified and broke down the problem (Lean A3)
  - Address the project in 4 Phases
    - Needs Assessment, Draft Implementation Plan, Pilot, Final Implementation and maintenance
- What is the progress toward goals, and the estimated measurable outcomes?
  - Completed needs assessment
  - Redoing the needs assessment because of change in staff and management
  - Current workflow done
- What is the estimated return on investment (costs versus benefits) for this project?
  - 50% reduction in cost through 50% reduction in staff time
  - 100% completeness of the response

# Next Steps

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- What are the next steps in this project?
  - Phase I Revise Needs Assessment
  - Phase II Draft Implementation Plan
  - Phase III Implement a Pilot
  - Phase IV Final Implementation and Maintenance
- What is the timeline for completion?
  - Phase I – February 2025
  - Phase II – June 2025
  - Phase III – August 2025
  - Phase IV – November 2025

# Challenges

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- Obstacles/barriers to the next steps or the project as a whole?
  - Almost a year delay in hiring (ombudsperson) and staff turnover
  - Training of staff involved in the process and their adaptation
  - Changing of the upper management and their process

# GEAR Board Ask

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- What does the project need from the GEAR Board?
  - Pointers on success with similar project
  - Potential effective tools for tracking, streamlining
  - Metrics used for similar projects

# GEAR

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

# Adjourn

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# Contact

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*Please direct any inquiries about the Delaware GEAR program to:*

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