

# Social Services Project

Lean Six Sigma Green Belt Project | Team 2

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# Define Phase

# Define: Project Charter

## Project Charter

### Social Services Data Tracking

#### Problem Statement

Currently, Social Services' doesn't have an effective way to track feedback to gather quantifiable, consistent, structured data.

#### Business Case & Benefits

Gathering quantifiable data will enable the City of North Port to measure access to services and identify gaps in unmet needs in the community. This data can be used to support informed resource allocation and drive funding decisions.

#### Goal Statements

Establish a formal, standardized process for tracking quantifiable data from citizen inquiries by March 31, 2026.

Implement a formal process for gathering citizen feedback on program usage, needs, and awareness through structured surveys by March 31, 2026.

#### Timeline

<u>Phase</u>	<u>Planned</u>	<u>Actual</u>
Define:	Jul-25	Jul-25
Measure:	Aug-25	Aug-25
Analyze:	Aug-25	Aug-25
Improve:	Jan-26	TBD
Control:	Mar-26	TBD

#### Scope In/Out

**In scope** includes identifying requirements for data collection tools, creating or enhancing a streamlined tracking mechanism, designing a citizen feedback mechanism, and providing effective project handoff support.

**Out of scope** includes making recommendations on budget or programming, engaging directly with citizens, and modifying or integrating tools mandated for compliance and reporting.

#### Team Members

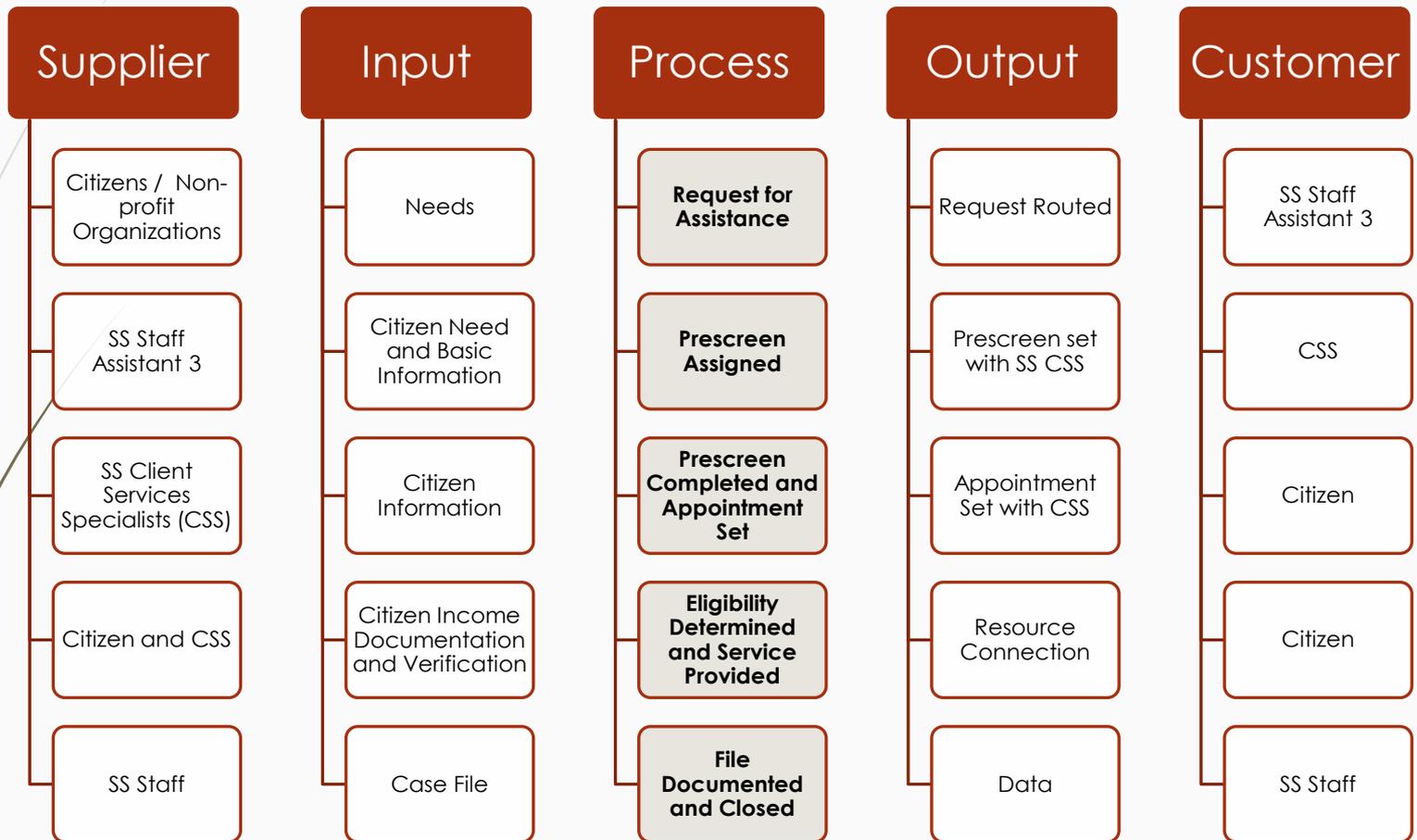
##### Core team:

Alex DiRamio - Information Technology  
Anna Duffey - Fire Rescue  
Jenn Sadonis - City Manager's Office  
Melissa McConnell - Utilities  
Rebecca Levan - Information Technology

##### Contributors:

Erin Eisenheimer - Social Services  
Janet Carrillo - Social Services

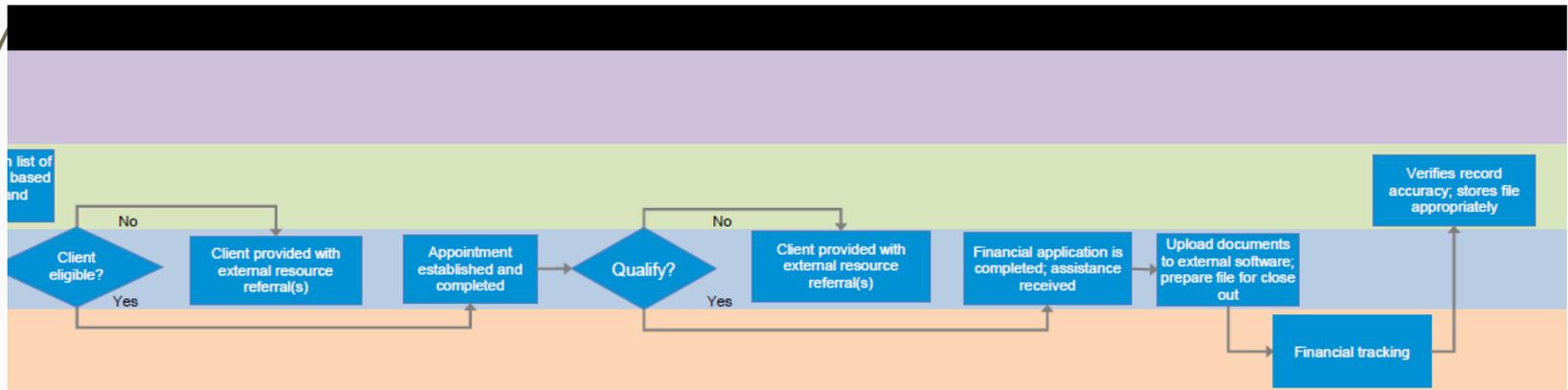
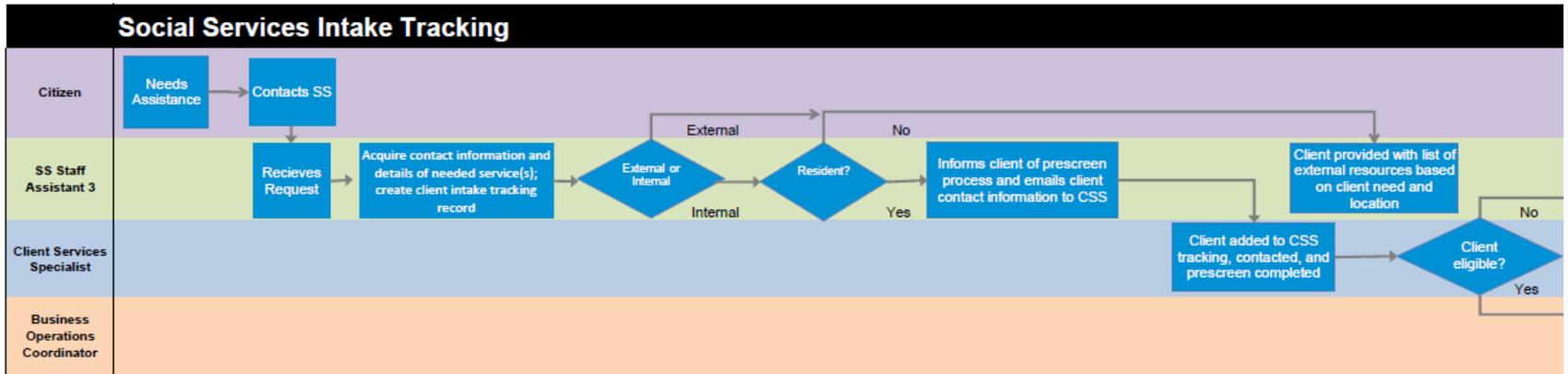
# Define: SIPOC





# Measure Phase

# Measure: Process Map



# Measure: Data Collection

Measure	Data Type	Operational Definition	Stratification Factors	Sampling notes	Who and How is Data Collected
Date/Time	Time	Date and time of call, walk-in, email.	Day, week, month.		Entered by the staff member taking the call/walk-in/referral etc.
Contact Information	Qualitative	How to contact client - phone, email, etc.	N/A		Entered by staff assistant
Nature of Inquiry	Qualitative	Reason for inquiry	Internal or external services, type of service or information sought	Information collected as a text entry in either initial intake if no CSS assigned, or on the CSS tracker if assigned.	Entered by staff assistant or by CSS if assigned in separate tracking systems.
Resolution	Qualitative	How the client's needs were met or resolved.	Completed internally, referred to external resources, unable to assist.	Resolution is captured as a text entry.	Resolution is captured as a text entry on the CSS Tracking - no resolution captured if no CSS assigned.



# Analyze Phase



# Reported Problem



**“Citizens of North Port are  
perceived to have  
underserved needs in the area  
of social services”**



# 5 Why's Root Cause Analysis

1

WHY?

Anecdotal Feedback

2

WHY?

Current Process Does Not Capture  
Quantifiable Data

3

WHY?

Process was designed for reactive service  
delivery, not data analysis

4

WHY?

Analytics and decision-support were not a  
requirement

5

WHY?

Previously, there was limited demand for KPIs,  
and no relevant Governance roles



## Root Cause

**Social Services processes were designed for immediate client assistance, not long-term measurement.**

**Leadership's prioritization of data-driven decision-making means we can establish standardized tracking to strengthen services and demonstrate impact.**

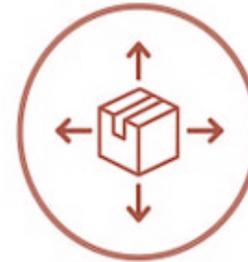
# 8 Wastes Analysis



**T**RANSPORT



**I**NVENTORY



**M**OTION

## TIMWOODS



**W**AITING



**O**VERPRODUCTION



**O**VERPROCESSING



**D**EFFECTS



**S**KILLS



**Improve Phase**

# Improve: Supporting Data & Analysis

## ➤ Solution Selection Matrix

- Compare and prioritize potential (brainstormed) solutions based on weighted criteria

Solution Selection Matrix							
<b>Project Goal</b> Establish a formal, standardized process for tracking quantifiable data from citizen inquiries by March 31, 2026.  Implement a formal process for gathering citizen feedback on program usage, needs, and awareness through structured surveys by March 31, 2026  Get approval for and adoption of new tools and processes by Social Services.	Please rank each solution for each criteria by using the 1-5 Scale as indicated below						
	Very Low (less good)		Moderate		Very High (best)		
	1	2	3	4	5		
Potential Solution (Provide Brief Description)	Potential to Meet Goal	Positive Customer Impact	Cost to Implement (1 = \$\$\$ & 5 = \$)	Stakeholder Buy-in	Time to Implement (1 = Long & 5 = Quick)	Total Score	Implement? Yes/No
Weighted Criteria	10	9	8	7	5		
Improve process to capture community needs via Intake Tracker	5	4	4	4	4	166	Yes
Customer Service Survey	4	4	3	3	4	141	Yes
Improve process to capture community needs via CSS Tracker	3	3	4	1	3	111	No
Merge inquiry and client tracking	3	3	4	1	3	111	No

# Improve: Supporting Data & Analysis

## ► Perform Risk Analysis

### ► FMEA (Failure Modes and Effects Analysis)

- Intake Tracker- Reduce Human Error in entering data into Tracker by implementing QAQC of Tracker.
- Customer Survey- Create a Clear & Concise survey that is fast and easy to complete

## FMEA

Process/Product Name: Social Services Intake Tracking& Customer Survey

Prepared By: Green Belt Group 2

Responsible: Social Services

FMEA Date (Orig.): 8/11/2025

(Rev.): 2/6/2026

Process Step/Input	Potential Failure Mode	Potential Failure Effects	SEVERITY (1 - 10)	Potential Causes	OCCURRENCE (1 - 10)	Current Controls	DETECTION (1 - 10)	RPN	Action Recommended	Resp.	Actions Taken	SEVERITY (1 - 10)	OCCURRENCE (1 - 10)	DETECTION (1 - 10)	RPN
What is the process step, change or feature under investigation?	In what ways could the step, change or feature go wrong?	What is the impact on the customer if this failure is not prevented or corrected?		What causes the step, change or feature to go wrong? (how could it occur?)		What controls exist that either prevent or detect the failure?			What are the recommended actions for reducing the occurrence of the cause or improving detection?	Who is responsible for making sure the actions are completed?	What actions were completed (and when) with respect to the RPN?				
Intake Tracker updated by SAII	Intake not tracked	Lose services needed by Residents	9	Human Error- Entry	8	None currently in place	10	720	Improve inquiry tracking form ;Institute QAQC of Intake Tracker data entered by SAII;	Business Operations Coordinator	Intake Tracker with an Entry System (ie. Drop downs; mandatory fields) & QAQC in place	8	2	3	48
Customer Survey	Feedback not tracked	Lose services needed by Residents	9	Refusal to complete- too tedious, time consuming	7	None currently in place	10	630	Clear and concise—fast and easy to complete; complete with Employee (Supplier)	Green Belt Group- Create Survey Staff- Survey is completed	Customer Survey with Entry System details in place	8	4	3	96

# Improve: Supporting Data & Analysis

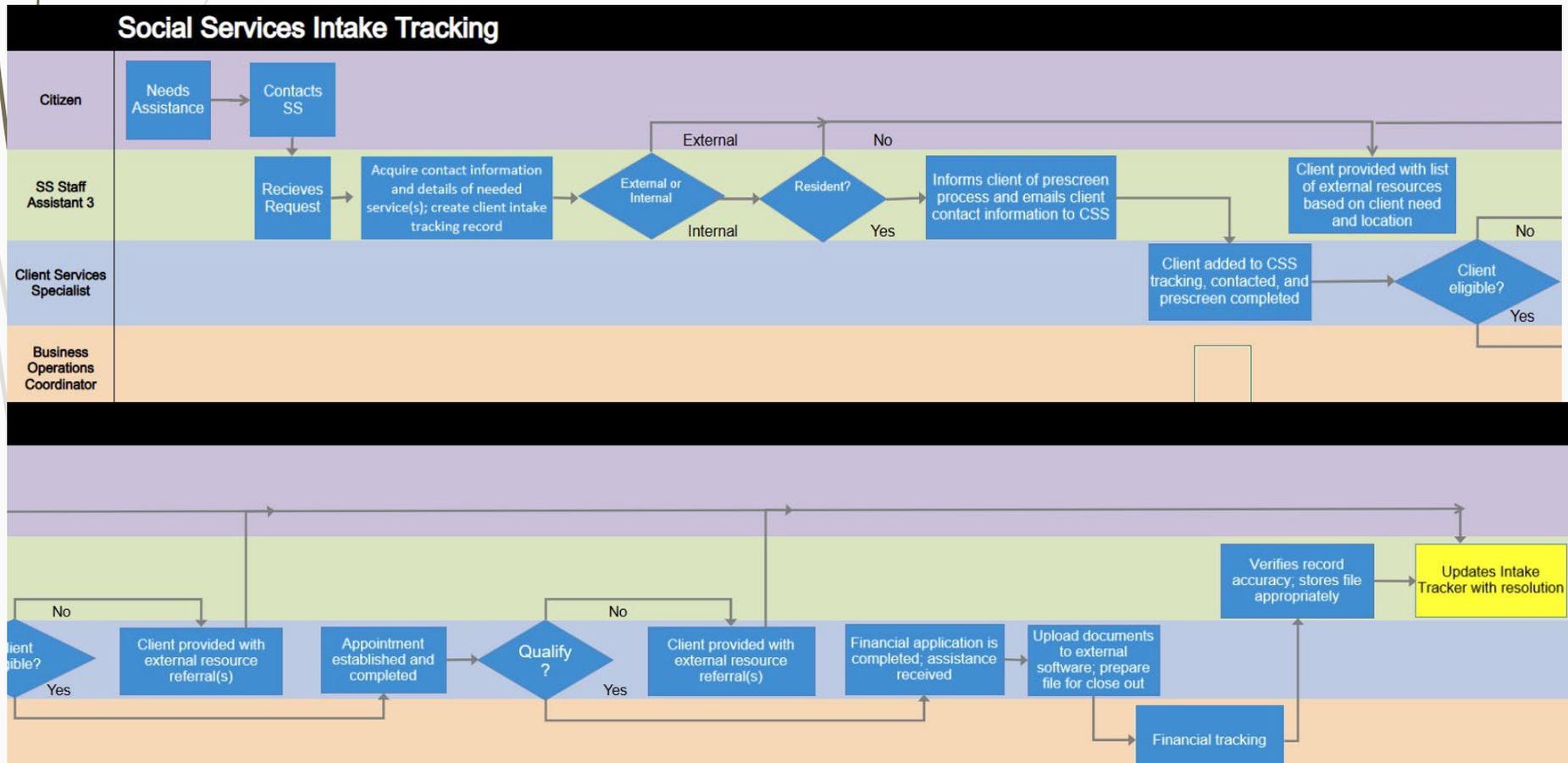
- **Pilot Plan-** a limited-scale trial used to test proposed solutions (Intake Tracker & Customer Service Survey).
- **Pilot Checklist-** Ensure methods are in place to *reduce risk, prevent gaps & support full implementation.*

Pilot Checklist		
Pilot Effort: <u>Data Tracking System</u>		
Pilot Strategy	Yes/No	Detail
Has the time frame for the pilot been established ?	Yes	6 months
Will the pilot be restricted to a particular customer segment?	Yes	Final Tracking; Customer Survey
Will the pilot involve a specific unit or application?	Yes	Intake Tracker; Customer Survey
Training Preparation		
Have process participants been briefed and prepared?	No	Only Stakeholders
Has a walk-through or talk-through of the new process been planned?	Yes	All staff have reviewed form
Have any new forms been created and shared?	Yes	Intake Tracker; Customer Survey
Measurement Plan		
Have the measures of success been agreed upon?	Yes	Survey Response; Services Rendered
Have checksheets or other methods of data collection been created?	Yes	Customer Survey
Have data collectors been trained and prepared?	No	All Staff
Adjustment Plan		
Are feedback mechanisms in place?	Yes	Contact with Group
Are plans in place to accommodate adjustment to the solutions?	Yes	Support from Green Belt Group

# Improve: Supporting Data & Analysis

## Process Map

Added: "Updates Intake Tracker with resolution"



# Improve: Proposed Solution - Client Intake Tracking

ation Forms Connections Dynamic View

Client Intake Tracking ☆

Last Name	First Name	Date	Source	Client Phone Number	Client Email	North Port Resident?	Initial Staff POC	Inquiry / Request Type	FSC Inquiry	FSC Related Text	Social Services Inquiry	Financial Assistance	DCF	Resource
Doe	J	08/20/25 1'	Phone Call	000-000-0000	jdoe@email.com		JC	Social Services			Financial Assistance	Past Due Rent		Employment
Smith	A	08/20/25 1'	Walk-In	000-000-0000		Yes	CE	Social Services			Clothing Closet			
Test	R	08/20/25 1'	Phone Call	000-000-0000	rtest@email.com	Yes		Social Services						

Improved inquiry tracking with staff entry form to collect more consistent and quantifiable data.

Development of data dashboard for visual data management and analysis.

## Client Intake Tracking



**Last Name \***

**First Name \***

**Source \***

**Client Phone Number \***

**Client Email**

**Inquiry / Request Type \***

**North Port Resident? \***

**CSS Assigned**

**Social Services Inquiry**

# Improve: Proposed Solution - Client Intake Tracking Dashboard

- Still in Development, the Inquiry Tracking Dashboard provides quick visual of year-to-date and monthly metrics.



# Improve: Proposed Solution – Post-Service Client Survey

Automation Forms Connections Dynamic View

Post-Service Client Survey ☆

Grid Filter Arial 10 B I U S A

Date	North Port Resident	Service Type	Other Service Type	Wait Time	Overall Experience	Staff Rating	Respect	Environment	Resolution	Why not?
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										



### Post-Service Client Survey

Are you a North Port Resident? \*

Yes  No

What services did you receive today? \*

Select one.

If you chose Other, please tell us what services you received. \*

How long did you wait to be seen today? \*

How would you rate the overall experience of your visit today? \*

(1 = Very dissatisfied - 5 = Very satisfied)

1  2  3  4  5

How would you rate the staff member(s) who assisted you today? \*

(1 = Poor - 5 = Excellent)

1  2  3  4  5

Did you feel treated with respect during your visit? \*

Yes  No

Was the office environment clean and welcoming? \*

Yes  Somewhat  No

- Created Client feedback survey with entry form to collect consistent and quantifiable data.
- Development of data dashboard for visual data management and analysis.



# Control Phase

## Control Plan: How the process is governed

Category	Control Method	Owner	Frequency
Inquiry Tracking	Monthly reports on categories, outcomes, response times	Process Owner	Monthly
Citizen Feedback	Structured survey review & insights	Process Owner	Bi-Annual
Data Accuracy	Review of entries & procedures	Supervisor	Quarterly
Staff Training/Adoption	Training completion records & refresher sessions	Supervisor	Annual

Key Takeaway: Clear owners, review frequency, and defined methods keep the process stable over time.

## Communication Plan: How the process is kept visible

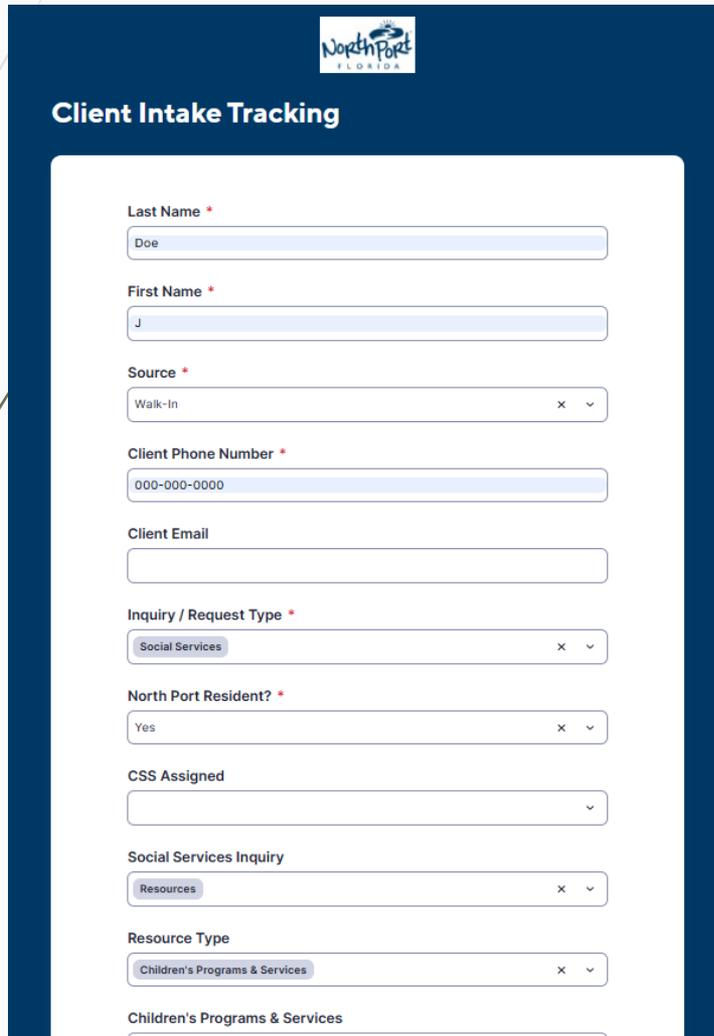
Audience	Frequency	Method	Responsibility	Purpose
Social Services Staff	Weekly during rollout; monthly after stabilization	Team huddles, email reminders, dashboards updates	Supervisors	Keep staff aligned expectations, thresholds, and improvements
Supervisors	Weekly	Huddle check-ins, email	Process Owner / Manager	Escalate issues, reinforce follow-up actions, and support staff
Leadership	Monthly	Dashboard summaries, monthly reports	Process Owner	Provide oversight, visibility of outcomes, and risks
City Leadership	Quarterly	Summary reports, check-in meetings	Process Owner with Project Lead support	Ensure transparency, maintain engagement, celebrate improvements



# Control: Monitoring & Response Plan

- **Metrics:** Accuracy, timeliness, error rates
  - **Frequency:** Monthly review by supervisors & project team
  - **Thresholds:** Accuracy triggers set for investigation
  - **Response:** Retraining or process adjustments
  - **Ownership:** Social Services Management with Lean Six Sigma support
- 

# Control: Mistake Proofing - Intake Tracking System



The screenshot displays the 'Client Intake Tracking' interface for NorthPort Florida. The form includes the following fields and controls:

- Last Name \***: Text input field containing 'Doe'.
- First Name \***: Text input field containing 'J'.
- Source \***: Dropdown menu with 'Walk-In' selected.
- Client Phone Number \***: Text input field with a format mask '000-000-0000'.
- Client Email**: Text input field.
- Inquiry / Request Type \***: Dropdown menu with 'Social Services' selected.
- North Port Resident? \***: Dropdown menu with 'Yes' selected.
- CSS Assigned**: Dropdown menu.
- Social Services Inquiry**: Dropdown menu with 'Resources' selected.
- Resource Type**: Dropdown menu with 'Children's Programs & Services' selected.
- Children's Programs & Services**: Text input field.

- ✓ Required fields prevent missing data
- ✓ Dropdown menus reduce entry errors
- ✓ Predefined categories ensure consistency
- ✓ Format validation (e.g., phone number) reduces incorrect entries

# Control: Mistake Proofing – Post Service Client Survey

- ✓ Required questions help ensure complete feedback
- ✓ Simple response options make surveys easy to complete
- ✓ Standardized responses support trend analysis over time



## Post-Service Client Survey

Are you a North Port Resident? \*

Yes  No

What services did you receive today? \*

Select one.

If you chose Other, please tell us what services you received. \*

How long did you wait to be seen today? \*

How would you rate the overall experience of your visit today? \*

(1 = Very dissatisfied - 5 = Very satisfied)

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Yes  No

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# Control: Project Closure



- Ownership & Handoff:
  - Process owner accountable for long-term sustainment
  - Leadership oversees adoption and outcomes
- Documentation to be Delivered:
  - Finalized procedures, training guides, survey templates, monitoring plan
- Next Steps:
  - 3-month post-rollout review
  - Annual review of metrics & adoption
  - Ongoing continuous improvement

Key Takeaway: Closure confirms sustainment and successful handoff.



# Thank You!

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