Lean Six Sigma
DMAIC Improvement Story

Green Belt Project Objective:

To Reduce the Difference between Budget and Actual Special Assessments for Guard Districts

Last Updated: 4-13-18

Team: *Tax JENRLS*

Juan Armas *(Co-Team Leader)* **Ryan Lafarga** *(Co-Team Leader)*
Silvia Lopez   Elaine Ramirez   Lorena Guerra-Macias   Nadine Blake
Suzanne Torano and Armando Gonzalez (SME)

Maria Nardi (Sponsors)

Christina Salinas Cotter (Process Owner)

The team developed a team Project Charter and secured signed off from sponsor.

Project Charter

Business Case	Project Name:	Reduce Variation in Tax assessment for Special Assessment Guard districts
	Problem/Impact:	Miami-Dade County's Special Assessment Guard Districts are facing unacceptable levels of assessment rate variations. Variation in tax assessment from expectations create a number of problems including, but not limited to: a) Complaints from residents; b) lack of trust toward county govt; c) Volatility of asmts; d) increased admin costs
	Expected Benefits:	Improved Res. satisfaction, reduced complaints; increased credibility, less admin cost
Objectives	Outcome Indicator(s):	Q1 - %(Absolute Value) Difference between Budget and Actual Tax Asmt (Rev & Exp)
	Proposed Target(s):	Target= 5%
	Time Frame:	Nov 2017 thru March 2018
	Strategic Alignment:	RC2-2, NI4-2,NI4-3 (see strategy map)
Scope	In Scope:	Special Assessment Guard Districts (Compliance with state law, county codes, ordinances)
	Out-of-Scope:	Ad Valorem , Lighting and Multipurpose Special Tax Districts
	Authorized by:	Mayor and BCC
Team	Sponsor:	Maria Nardi
	Team Leader:	Juan Armas *(Co-Team Leader)* Ryan Lafarga *(Co-Team Leader)*
	Team Members:	Silvia Lopez Elaine Ramirez Lorena Guerra-Macias Nadine Blake
	Process Owner(s):	Christina Salinas Cotter
	Mgmt Review Team:	Michael Bauman, Gil Delgado, Christina Salinas Cotter, Maria Nardi
Schedule	Completion Date:	3/30/18
	Review Dates:	Monthly and Final Review in March 2018
	Key Milestone Dates:	See Action Plan

Define Measure Analyze Improve Control

Develop Project Timeline Plan

The team developed a Timeline Plan to complete their Project.

Legend:	
▓	= Actual
☐	= Proposed

WHAT: Reduce Differences in Tax Asmt Budget and Actuals for Spec Asmt Districts

HOW	WHEN						
	Month 2017-2018						
	Nov	Dec	Jan	Feb	Mar	Apr	May
1. DEFINE	☐ Completed 12/15/17						
2. MEASURE	☐ Completed 1/5/18						
3. ANALYZE			☐ Completed 1/19/18				
4. IMPROVE				☐		4/13/18	
5. CONTROL							☐ On-going

Define ⟩ Measure ⟩ Analyze ⟩ Improve ⟩ Control

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Project Alignment to Strategy

Our Project directly supports two (2) Miami-Dade County Strategic Plan Goals.

Miami-Dade County Strategic Plan Goals

RC2-2: Ensure facilities are safe, clean and well-run

NI4-2: Promote livable and beautiful neighborhoods

Scorecard Perspective

Customer • Financial • Internal

PROS Objectives

Achieve Sustainability • Implement Placemaking • Achieve Performance Excellence

Reduce variation in Special Taxing Guard Districts

Define Measure Analyze Improve Control
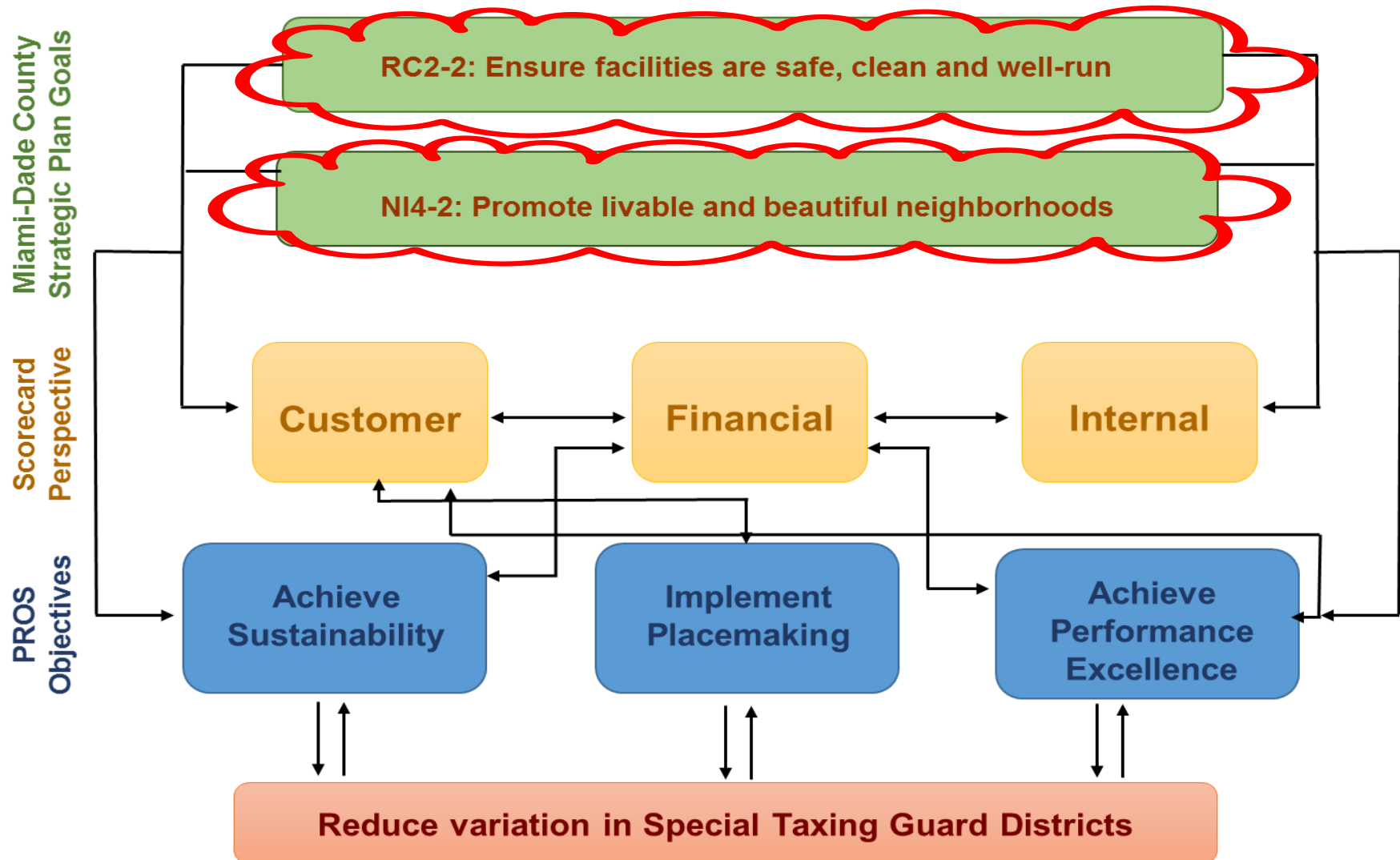
A Special Assessment District is a designated area where a majority of **property owners agreed to allow Miami-Dade County, through Chapter 18 of Miami-Dade Code, to levy a special property tax in exchange for a specific service.**

Special Assessment Districts give communities the opportunity to make improvements in the public areas of their neighborhoods which could not be conveniently or equitably done otherwise. **Improvements include: street lighting; security guard services; multipurpose maintenance and capital improvements/road maintenance.**

Parks, Recreation and Open Spaces (PROS) Special Assessment Districts Division (SADD) is responsible for the management and operation of 1,070 active special assessment districts providing services to approximately 389,740 households. **Of these 1,070 special assessment districts, 44 (4%) are Special Assessment Guard Districts, comprised of 13,845 households and 46% of the overall Special Assessment Districts Division budget.**

Construct Process Flow Chart

5. ✅

The team constructed a Process flow chart describing the Process.

The team next looked Stakeholder process needs

Create/ Adjust And Manage Budget For Special Taxing Guard District (Process Owner: Special taxing Div Director)

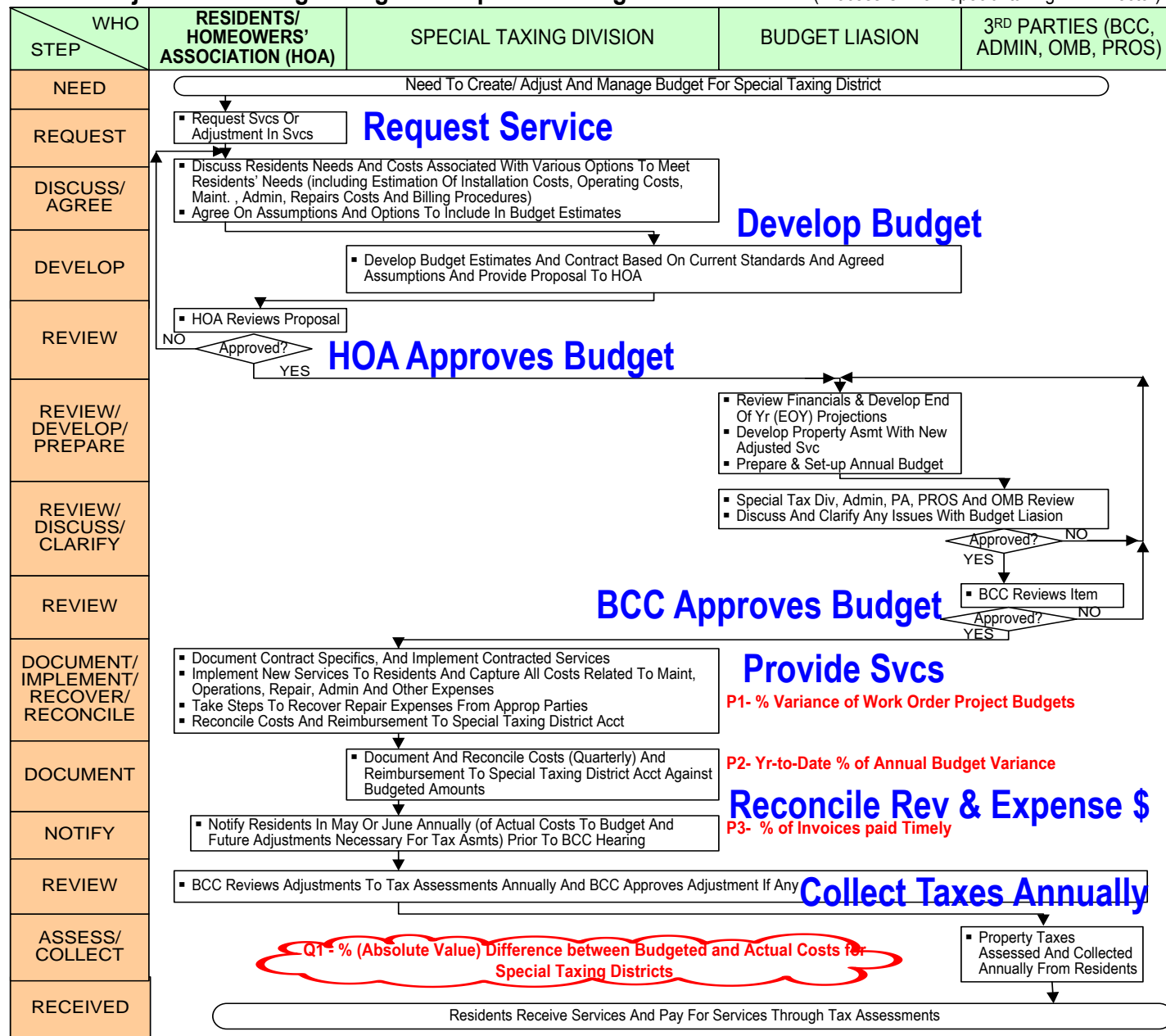| WHO / STEP	RESIDENTS/ HOMEOWERS' ASSOCIATION (HOA)	SPECIAL TAXING DIVISION	BUDGET LIASION	3RD PARTIES (BCC, ADMIN, OMB, PROS)
NEED	Need To Create/ Adjust And Manage Budget For Special Taxing District			
REQUEST	▪ Request Svcs Or Adjustment In Svcs **Request Service**			
DISCUSS/ AGREE	▪ Discuss Residents Needs And Costs Associated With Various Options To Meet Residents' Needs (including Estimation Of Installation Costs, Operating Costs, Maint. , Admin, Repairs Costs And Billing Procedures) ▪ Agree On Assumptions And Options To Include In Budget Estimates			
DEVELOP		▪ Develop Budget Estimates And Contract Based On Current Standards And Agreed Assumptions And Provide Proposal To HOA **Develop Budget**		
REVIEW	▪ HOA Reviews Proposal NO Approved? YES **HOA Approves Budget**			
REVIEW/ DEVELOP/ PREPARE				▪ Review Financials & Develop End Of Yr (EOY) Projections ▪ Develop Property Asmt With New Adjusted Svc ▪ Prepare & Set-up Annual Budget
REVIEW/ DISCUSS/ CLARIFY				▪ Special Tax Div, Admin, PA, PROS And OMB Review ▪ Discuss And Clarify Any Issues With Budget Liasion Approved? NO YES
REVIEW		**BCC Approves Budget**		▪ BCC Reviews Item Approved? NO YES
DOCUMENT/ IMPLEMENT/ RECOVER/ RECONCILE		▪ Document Contract Specifics, And Implement Contracted Services ▪ Implement New Services To Residents And Capture All Costs Related To Maint, Operations, Repair, Admin And Other Expenses ▪ Take Steps To Recover Repair Expenses From Approp Parties ▪ Reconcile Costs And Reimbursement To Special Taxing District Acct **Provide Svcs** **P1- % Variance of Work Order Project Budgets**		
DOCUMENT		▪ Document And Reconcile Costs (Quarterly) And Reimbursement To Special Taxing District Acct Against Budgeted Amounts **P2- Yr-to-Date % of Annual Budget Variance**		
NOTIFY	▪ Notify Residents In May Or June Annually (of Actual Costs To Budget And Future Adjustments Necessary For Tax Asmts) Prior To BCC Hearing **Reconcile Rev & Expense $** **P3- % of Invoices paid Timely**			
REVIEW	▪ BCC Reviews Adjustments To Tax Assessments Annually And BCC Approves Adjustment If Any **Collect Taxes Annually**			
ASSESS/ COLLECT		**Q1 - % (Absolute Value) Difference between Budgeted and Actual Costs for Special Taxing Districts**		▪ Property Taxes Assessed And Collected Annually From Residents
RECEIVED	Residents Receive Services And Pay For Services Through Tax Assessments			

MD_DMAIC_Story_Reduce Tax Asmt Variations from Budget_FLOWCHART_12-14-17.vsd 12/18/17

Stakeholder Needs

The team identified stakeholder needs for the process outputs.

Stakeholders Needs	
Stakeholders	**Process Output Needs**
Homeowners in the Special Assessment Guard Districts	Accurate tax assessments
	Quality/reliable guard services
	Safe and aesthetically pleasing neighborhoods
Mayor and Board of County Commissioners	Reduced complaints from constituents
	Accurate tax assessments
County staff	Reduced complaints from constituents
	Accurate tax assessments
	Stable workload and efficient budgeting practices

Cost of Poor Quality

The team identified the hidden costs of the volatile annual tax assessments.

Stakeholder	Pain Experienced	Annualized "Costs"
Homeowners in the Special Assessment Guard Districts	Dissatisfaction with Variances	(Special tax Guard Districts with Variances)*(30 hrs FTE)*($103 per hour)= 32*30*103= **$98,880**
Mayor and Board of County Commissioners	Loss of credibility with constituents	AD costs $113 hr* 30 hrs = **$3,390**
County staff	Loss of credibility with constituents Stressful work environment Reconcile differences	Staff Costs = **$29,568** • Budget Liaison $52 hr*15 hrs*16 weeks**= $12,480** • AD $113 hr*5 hrs*16 weeks**=$9,040** • Chief of Tax Div $89 hr* 2hrs* 16 weeks **=$2,848** • SPA of Tax Div $66*5hrs*16 weeks = **$5,200**

Total Cost of Poor Quality Savings = $131,838 Annually

▪Define ▪Measure ▪Analyze ▪Improve ▪Control

Identify Data Collection Needs

The team developed a spreadsheet to help analyze the process.

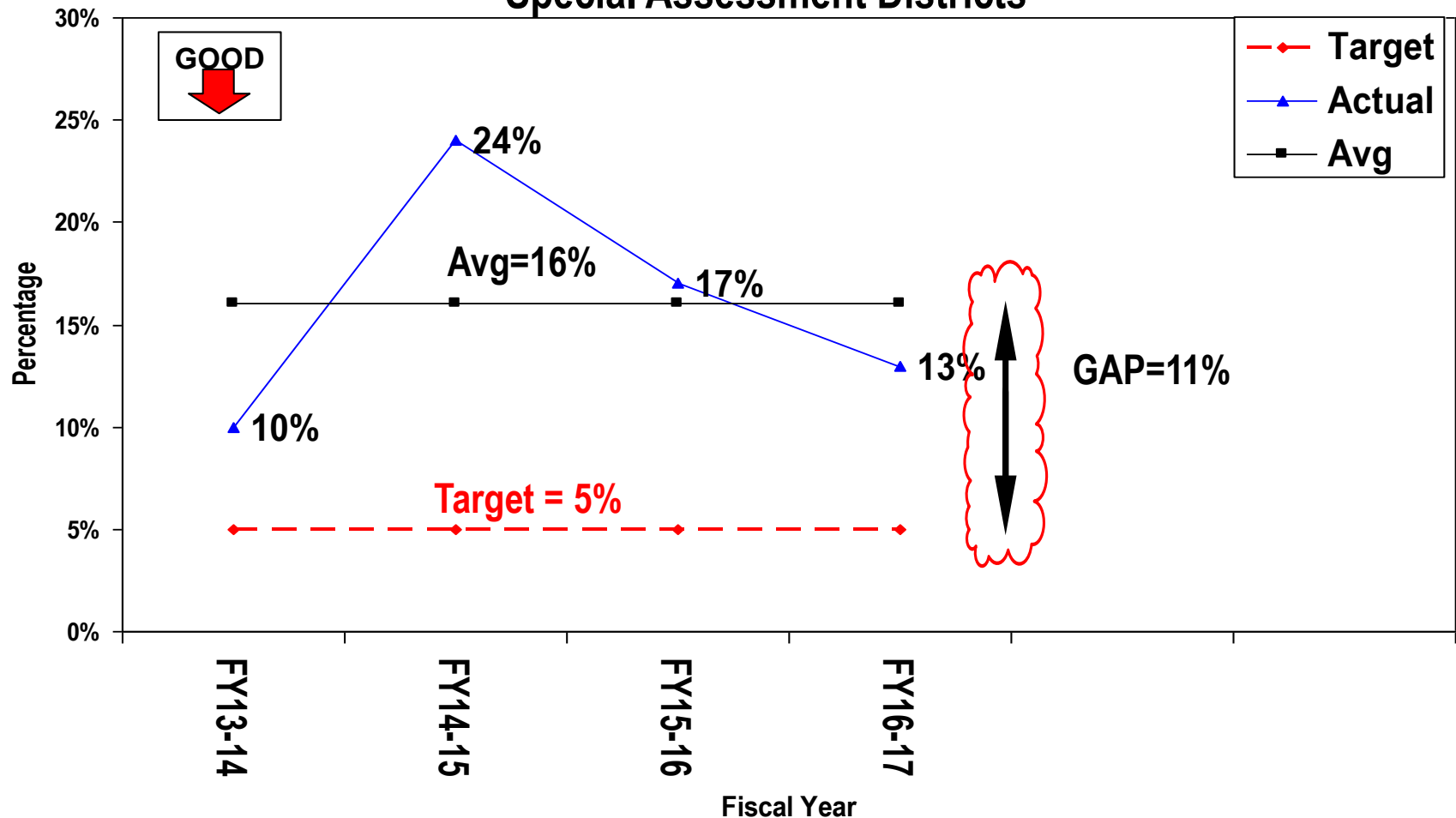**Special Assessment Districts Summary (***each row is a Special Assessment District Info for 1 year***)**

BCB														DEMOGRAPHICS	
		WHAT			WHO	WHAT				WHAT					
	B	C	D	E	F		Expenses				Revenues				
						G	H	I	J	K	L	M	N	O	
Line #	Fiscal Year	Special Taxing Distrct #/Name	Project #	Type of Security	Type of Contractor	Budget	Actual	Dollars Difference	Percent Difference	Fund Balance (Surplus/ Deficit)	Budget	Actual	Dollars Difference	Percent Difference	
Total				% Guard	% Police	Total			% Avg		Total			% Average	
140	<= # Rows			0%	0%	$39,693,173	$39,209,368	-$483,805	$64	$344,278	$39,692,367	$37,343,876	-$2,348,491	$2	
1	FY 2013-2014	ENTRADA	905241	Guard House	Private	$219,300	$204,741	-$14,559	-7%	-$25,405	$219,300	$216,621	-$2,679	-1%	
1	FY 2013-2014	BELLE MEADE ISLAND	905012	Guard House	Private	$222,700	$212,350	-$10,350	-5%	-$23,799	$222,700	$222,922	$222	0%	
2	FY 2013-2014	KEYSTONE POINT	905008	Guard House	Private	$644,600	$605,320	-$39,280	-6%	-$118,188	$644,600	$630,894	-$13,706	-2%	

				WHERE	WHAT	WHERE		WHAT					
Taxing Difference				T	U	V	# of Folios/ Units Assessed			Folio Breakdown			
P	Q	R	S	Location (Incorp or UMSA)	Type (Apt or Single Family)	Commis-sion District	W	X	Y	% Deve-loped	% Vacant	% Condo	
Dollars Difference	Absolute Dollars Difference	Percent Difference	Absolute Value Percent Difference				Budget	Actual	Differ-ence				
Total		% Avg	% Wtd Avg	% Incorp	%F Prctc	%Y	Total			Avg			
$1,864,687		45%	20%	0%	0.0		310	280	-30			0.6	
			Q1										
-$11,880	$11,880	-5%	5%	Incorp	1								
-$10,573	$10,573	-5%	5%	Incorp	1								
-$25,574	$25,574	-4%	4%	Incorp	1								

▪**Define** ▶ ▪**Measure** ▶ ▪**Analyze** ▶ ▪**Improve** ▪**Control**

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Display Indicator Performance "Gap"

The team collected Q1 indicator data and reviewed performance trends:

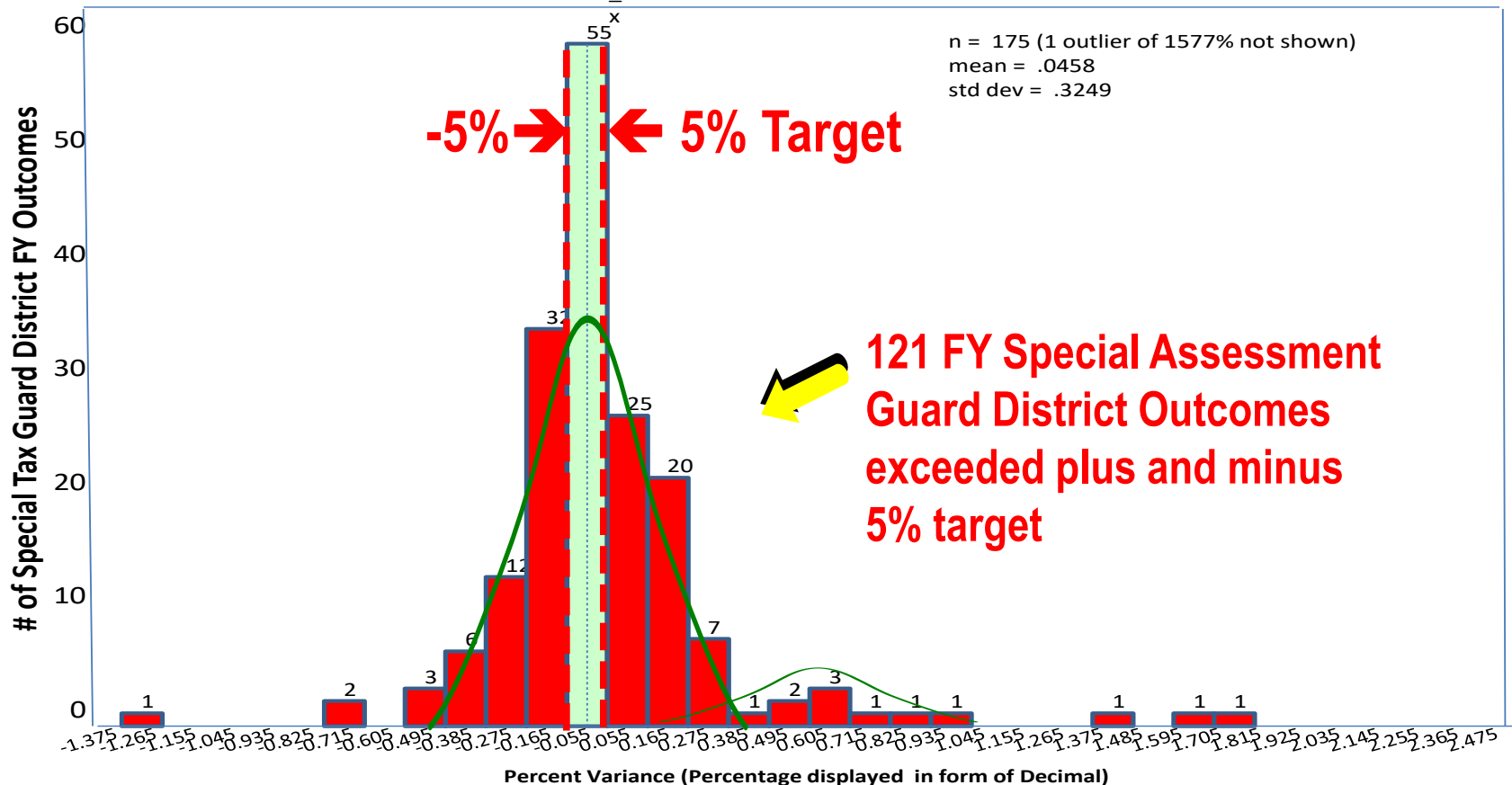**Q1 - % (Absolute Value) Difference between Budgeted and Actual Costs for Special Assessment Districts**

Legend:
- Target
- Actual
- Avg

GOOD

24%

Avg=16%

17%

13%

GAP=11%

10%

Target = 5%

Percentage

Fiscal Year — FY13-14, FY14-15, FY15-16, FY16-17

Define | Measure | Analyze | Improve | Control

The team stratified the 176 Special Assessment Guard Districts Outcomes many ways and found…

Special Tax Guard District Budget Year Outcomes FY13-14 through FY16-17

n = 175 (1 outlier of 1577% not shown)
mean = .0458
std dev = .3249

-5% → ← 5% Target

121 FY Special Assessment Guard District Outcomes exceeded plus and minus 5% target

Y-axis: # of Special Tax Guard District FY Outcomes
X-axis: Percent Variance (Percentage displayed in form of Decimal)

The team looked closer at the 121 Special Assessment Guard District FY Outcomes exceeding target.

The team stratified the 121 Outcomes (not achieving target) many ways and found…

**Special Tax Guard District Budget Year Outcomes
Worse than of 5% from Target - FY13-14 through FY16-17**

n = 120(1 outlier of $586,052 not shown)
mean = 11635.4
std dev = 74396

x̄

Y-axis: **# of Special Tax Guard District FY Outcomes**

Bar values: 1, 1, 4, 7, 35, 14, 33, 12, 7, 4, 1, 1

59 (49%) Special tax Guard Districts were $21,000 or more over Budget (and averaged $80,249 over Budget)

X-axis: **$ Variance from Budget**

-266000.5 -225000.5 -184000.5 -143000.5 -102000.5 -61000.5 -20000.5 20999.5 61999.5 102999.5 143999.5 184999.5 225999.5 266999.5 307999.5 348999.5

The team looked closer at the 59 Special Assessment Guard District FY Outcomes.

Stratify Problem

The team stratified the 59 outcome years many ways and found…

**Special Tax Guard District Budget Year Outcomes
Net $ Variance >$21K and worse than 5% from Target - FY13-14 through FY16-17**

n = 59
mean = 55426.1017
std dev = 93974.9359

33 (56%) Special Assessment Guard Districts were over $28,097 the Expense Budget

Y-axis: # of Special Tax Guard District Outcomes

X-axis: Expense $ Variation From Budget

Bar values: 26, 23, 8, 1, 1

X-axis labels: -136124.3, -54013.65, 28097, 110207.65, 192318.3, 274428.95, 356539.6, 438650.25, 520760.9, 602871.55, 684982.2

Problem Statement: *"33 Special Assessment Guard District FY13-14 through FY16-17 Budget Year Outcomes that exceeded the targeted 5% variance had a Net $ Variance >$21K with each outcome incurring $28,097 or more in Expenses over budget ""*

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The team conducted Single Case Bore Analysis…

Single Case Bore Analysis

Problem Statement: *""33 Special Tax Guard District FY13-14 through FY16-17 Budget Year Outcomes that exceeded the targeted 5% variance had a Net $ Variance >$21K with each outcome incurring >=$28,097 in Expenses over budget "*

Reasons or Factors *(that contributed to an Expense variation)*	1-905253-HAM	2-905014-SAN	3-905227-EAS	4-905021-EAS	5-905242-FAI	6-905253-HAM	7-905005-N D	8-905003-MIA	9-905018-OLI	10-905849-LA	11-905004-HA	12-905012-BE	13-905005-N	15-905235-KI	Total	Percentage
1) Underbudgeted based on previous year Actual (despite Variance from Previous yr budget)	X			X											2	14%
2) New District (was less than 2 years)	X				X			X							3	21%
C 3) Large Fund Balance from previous year	X	X	X	X	X	X			X			X			8	57%
A 4) Actual Charges for County Svcs Higher than other years	X	X	X	X	X	X	X	X	X		X	X		X	12	86%
B 5) Actual Revenue Greater than Budget					X	X									2	14%
6) Large Variance in Admin Costs		X				X	X	X	X	X	X	X	X	X	10	71%
7) Insufficient Revenues	X								X						2	14%

Random Sample of 15 of the 33 Districts

The team will include these 3 major factors in in cause and effect analysis.

Identify Potential Root Causes

The team completed the Fishbone Analysis…

A –Actual Charges for Contractual Services Higher than other Years other (86%)

C & E Diagram Problem Statement

County was not receiving Invoice timely form Guard venders and did not accrue the expected expense

County tax District Staff did not accrue the late expected expenses

County tax District Staff not aware of the accrual policy

A1 County tax District Staff not adequately trained on accruals

A2 No Written Procedures for how to claim an accrual for late guard invoices

"33 Special Tax Guard districts over 5% variance and over $21,000 overage had Over $28,000 over in expenses"

Fund Balances were higher that reality

County tax District Staff did not accrue the late expected expenses

A1 County tax District Staff not adequately trained on accruals

Admin costs were changed during the year and not in the Budget

B Budget Process does not anticipate all future adjustments known prior to budget

= Potential Root Cause

C –Large Fund Balance from Previous Year (57%)

B- Large Variance in Admin Costs (71%)

▪Define ▸Measure ▸Analyze ▸Improve ▪Control

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Verify Root Causes

The team collected data to verify the root causes and found….

Root Cause Verification Matrix

	Potential Root Cause	How Verified?	Root Cause or Symptom
A1	County Tax District Staff are not adequately trained on accruals	Interviewed Workers and Supvs and found not all were adequately trained on County and tax District accrual policies	Root Cause
A2	No Written Procedures for how to claim an accrual for late guard Vendor invoices	Review Procedures and verified no written procedure for how to claim accruals for late invoiices and other variances	Root Cause
B	Budget Process does not anticipate all future adjustments known prior to budget	Review Budget Process Procedures and verified no written procedure to consider all future adjustments known prior to budget	Root Cause

All three (3) were validated as root causes.

Identify and Select Countermeasures

The team brainstormed many countermeasures and narrowed them down to these for evaluation:

		Countermeasures Matrix				
Problem Statement	**Verified Root Causes**	**Countermeasure**	**Effectiveness**	**Feasibility**	**Overall**	**Take Action? Yes/No**
"33 Special Tax Guard districts over 5% variance and over $21,000 overage had Over $28,000 over in expenses"	**A1**- County Tax District Staff are not adequately trained on accruals	**A1**- Develop training involving Miami-Dade Accrual Policy and how it applies to Taxing Guard District activities	4	5	20	Y
	A2- No Written Procedures for how to claim an accrual for late guard Vendor invoices	**A2**- Develop procedure for how to handle late Invoices and other activities appropriate for the accrual process	4	5	20	Y
	B- Budget Process does not anticipate all future adjustments known prior to budget	**B1**- Develop Checklist Budget tool (and include in process) to assist in identify known possible future adjusts to be considered in the coming budget	5	5	25	Y

Legend: 5=Extremely, 4=Very, 3=Moderately, 2=Somewhat, 1=Little or None

The team selected 3 Countermeasures for implementation.

Define ▸ Measure ▸ Analyze ▸ Improve ▸ Control

The team performed Barriers and Aids analysis on the selected Countermeasures.

Countermeasure(s): Implement 3 Countermeasures to Reduce Tax District Variances		
Barriers		**Aids**
Impact (H, M, L)	**Forces against Implementation**	**Forces For Implementation**
L	1) Push Back from Staff *(Supported by Aids: A, B)*	A) Management very supportive of efforts
H	2) Limited staff time to spend on training away from work *(Supported by Aids:A,B,C)*	B) Benefits $ Savings, Customer Satisfaction, Political environment improved, increased credibility
		C) Knowledgable Trainers

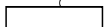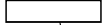**The team next sought to incorporate this analysis into the team's Action Plan.**
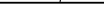
Develop and Implement Action Plan

The team implemented an Action Plan for the team's Countermeasures.

17. ☑

WHAT: Implement 3 Countermeasures to Reduce Taxing Guard District Variations form Budget

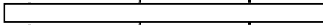| HOW	WHO	WHEN 2018						
		Jan	Feb	Mar	Apr	May	Jun	Jul
1. Develop Countermeasures/ Practical Methods:								
A1- Develop training involving Miami-Dade Accrual Policy and how it applies to Taxing Guard District activities	Lorena, Juan, Elaine	□ ■	2/19/18					
A2- Develop procedure for how to handle late Invoices and other activities appropriate for the accrual process	Lorena, Juan, Elaine	□ ■	2/19/18					
B1- Develop Checklist Budget tool (and include in process) to assist in identify known possible future adjusts to be considered in the coming budget	Ryan, Silvia, ,Nadine	□ ■	2/19/18					
2. Secure Management Approval of Countermeasures (share benefits and savings)	Team			□ 3/30/18				
3. Communicate/Train Staff in Countermeasures and related policies/procedures (share benefits and Mgmt Support)	Team			□	4/30/18			
4. Implement Countermeasures	Team				□	5/31/18		
5. Establish On-going responsibilities and standardize countermeasures into operations	Team					□		On-Going

Define > Measure > Analyze > **Improve** > Control

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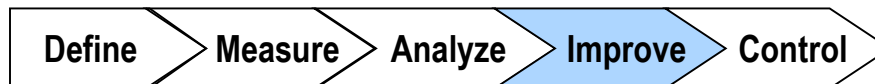
Estimated Return on Investment (ROI)

The team estimated the net benefits and ROI.

ROI WORKSHEET for: **Reducing Variation from Budget to Actual in Special Assessment Guard Districts**

ITEMIZED COSTS (DESCRIPTION)	$ VALUE (ANNUALIZED)	ITEMIZED BENEFITS (DESCRIPTION)	$ VALUE (ANNUAL-IZED)
A1- Develop training involving Miami-Dade Accrual Policy and how it applies to Taxing Guard District activities	$500	Improve customer satisfaction, improve county credibility, reduce staff time (see Cost of Poor Quality)	$131,838
A2- Develop procedure for how to handle late Invoices and other activities appropriate for the accrual process	$200		
B1- Develop Checklist Budget tool (and include in process) to assist in identify known possible future adjusts to be considered in the coming budget	$200		
Total Annualized Costs	**$900**	**Total Expected Annualized Benefits**	**$131,838**
Net Benefits==> $130,938			
ROI==> 145 : to 1 ratio			

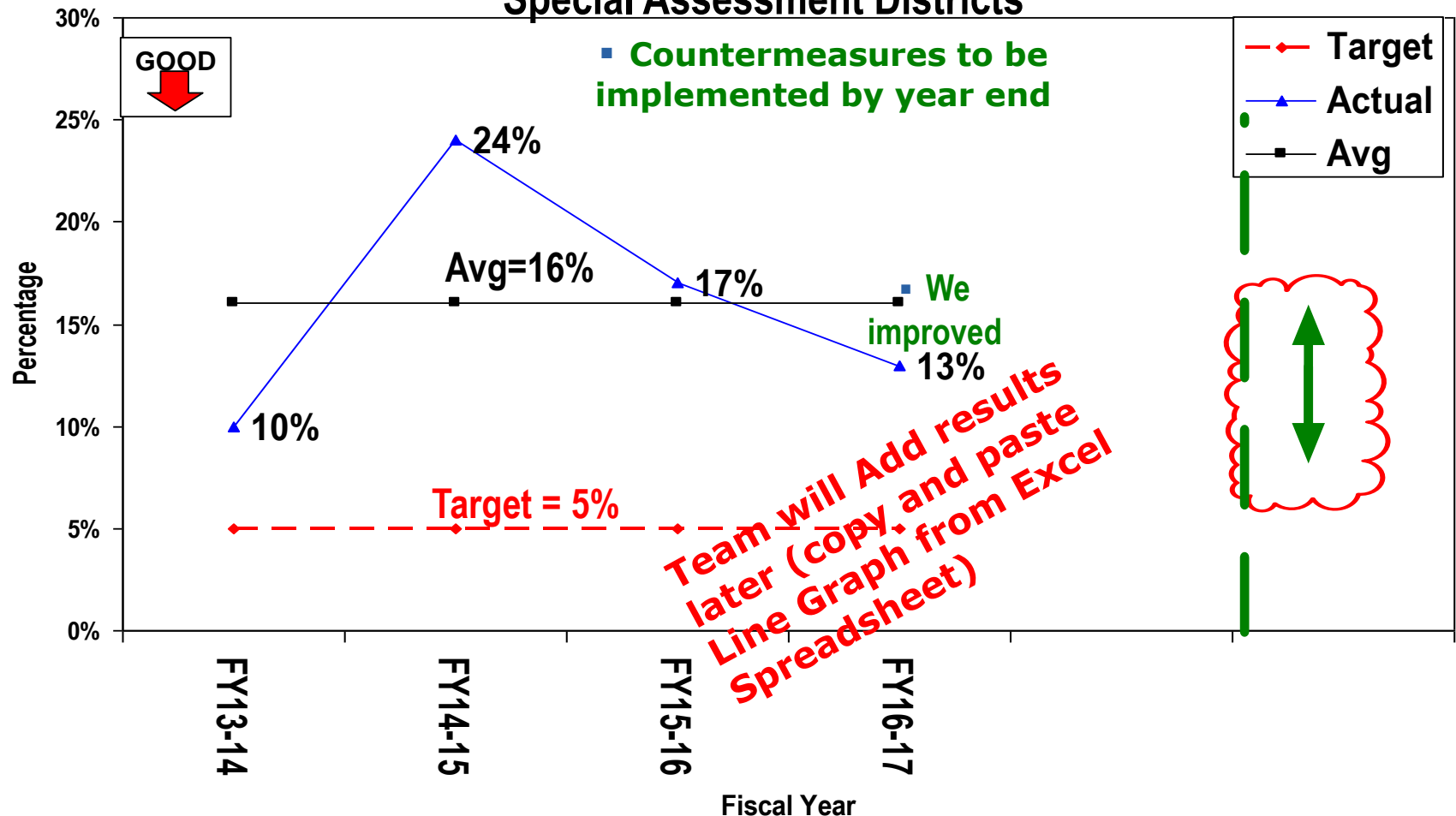# Review Results

The team collected indicator data and reviewed performance trends:

Q1 - % (Absolute Value) Difference between Budgeted and Actual Costs for Special Assessment Districts
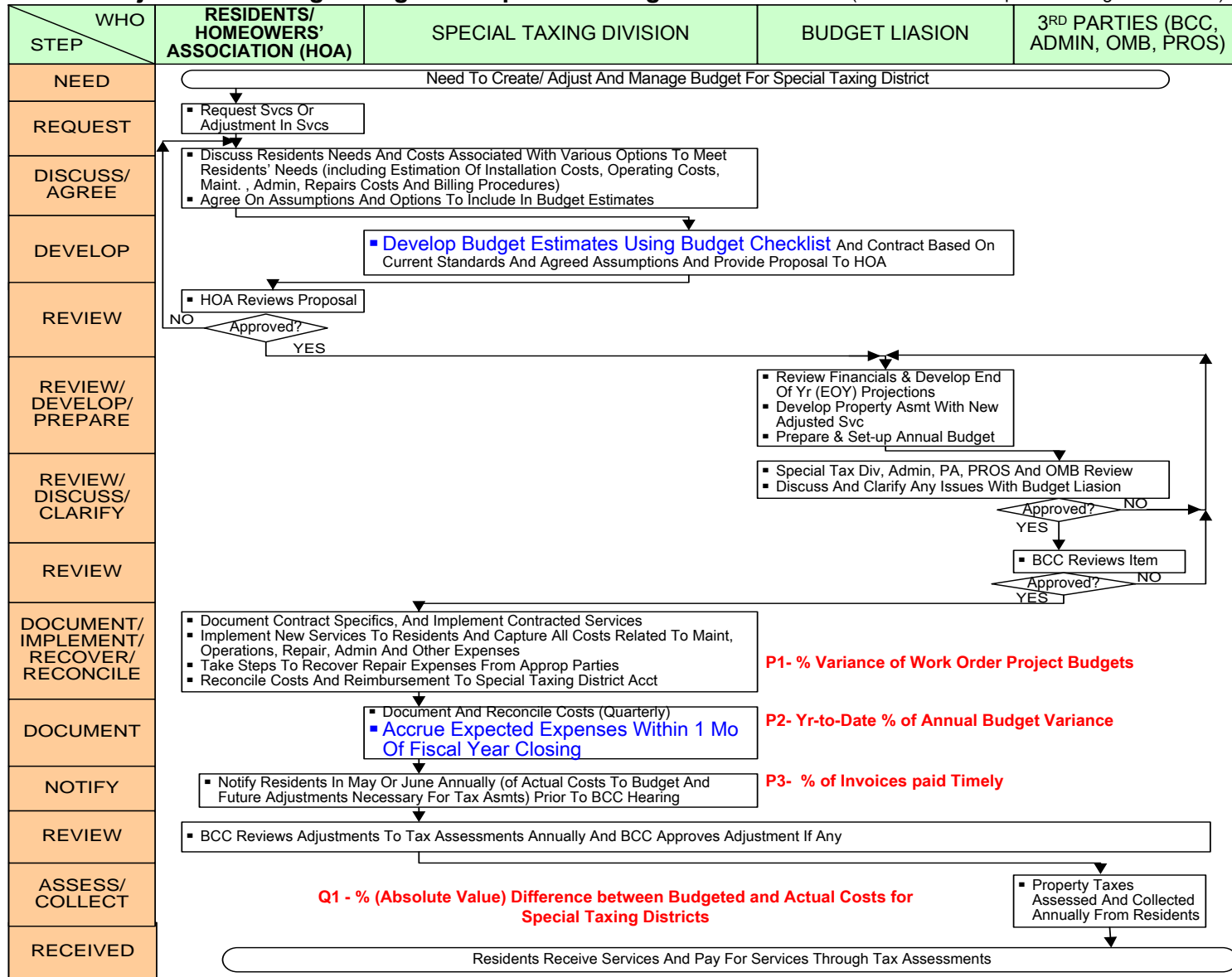

The team will continue to monitor the countermeasures.

Standardize Countermeasures

The team incorporated their **counter-measures** into their Process Flowchart.

Create/ Adjust And Manage Budget For Special Taxing Guard District (Process Owner: Special Taxing Div Director)

WHO / STEP	RESIDENTS/ HOMEOWERS' ASSOCIATION (HOA)	SPECIAL TAXING DIVISION	BUDGET LIASION	3RD PARTIES (BCC, ADMIN, OMB, PROS)
NEED	Need To Create/ Adjust And Manage Budget For Special Taxing District			
REQUEST	▪ Request Svcs Or Adjustment In Svcs			
DISCUSS/ AGREE		▪ Discuss Residents Needs And Costs Associated With Various Options To Meet Residents' Needs (including Estimation Of Installation Costs, Operating Costs, Maint. , Admin, Repairs Costs And Billing Procedures) ▪ Agree On Assumptions And Options To Include In Budget Estimates		
DEVELOP		▪ Develop Budget Estimates Using Budget Checklist And Contract Based On Current Standards And Agreed Assumptions And Provide Proposal To HOA		
REVIEW	▪ HOA Reviews Proposal NO / Approved? / YES			
REVIEW/ DEVELOP/ PREPARE			▪ Review Financials & Develop End Of Yr (EOY) Projections ▪ Develop Property Asmt With New Adjusted Svc ▪ Prepare & Set-up Annual Budget	
REVIEW/ DISCUSS/ CLARIFY			▪ Special Tax Div, Admin, PA, PROS And OMB Review ▪ Discuss And Clarify Any Issues With Budget Liasion / Approved? YES / NO	
REVIEW				▪ BCC Reviews Item / Approved? YES / NO
DOCUMENT/ IMPLEMENT/ RECOVER/ RECONCILE		▪ Document Contract Specifics, And Implement Contracted Services ▪ Implement New Services To Residents And Capture All Costs Related To Maint, Operations, Repair, Admin And Other Expenses ▪ Take Steps To Recover Repair Expenses From Approp Parties ▪ Reconcile Costs And Reimbursement To Special Taxing District Acct	**P1- % Variance of Work Order Project Budgets**	
DOCUMENT		▪ Document And Reconcile Costs (Quarterly) ▪ Accrue Expected Expenses Within 1 Mo Of Fiscal Year Closing	**P2- Yr-to-Date % of Annual Budget Variance**	
NOTIFY		▪ Notify Residents In May Or June Annually (of Actual Costs To Budget And Future Adjustments Necessary For Tax Asmts) Prior To BCC Hearing	**P3- % of Invoices paid Timely**	
REVIEW	▪ BCC Reviews Adjustments To Tax Assessments Annually And BCC Approves Adjustment If Any			
ASSESS/ COLLECT	**Q1 - % (Absolute Value) Difference between Budgeted and Actual Costs for Special Taxing Districts**			▪ Property Taxes Assessed And Collected Annually From Residents
RECEIVED	Residents Receive Services And Pay For Services Through Tax Assessments			

MD_DMAIC_Story_Reduce Tax Asmt Variations from Budget_FLOWCHART_12-18-17.vsd 2/4/18

Standardize Countermeasures

The team completed the Process Control System form for the Process.

Process Control System

Process Name: Create/ Adjust and Manage Budget for Special Taxing Guard District			**Process Owner:** Special Taxing Div Director			
Process Customer: Residents in Taxing Guard Districts			**Critical Customer Requirements:** Provide Guard Services and manage costs			
Process Purpose: Provide Guard Services and collect costs from property Taxes			**Current Sigma Level:** TBD **Outcome Indicators:** Q1			
Process and Quality Indicators			Checking / Indicator Monitoring			Contingency Plans / Misc. • Actions Required for Exceptions • Procedure References
Process Indicators And Quality Indicators	Control Limits Specs/ Targets	Data to Collect What is Checking Item or Indicator Calculation	Timeframe (Frequency) When to Collect Data?	Responsibility Who will Check?		
P1 % Variance of Work Order Project Budgets	5%	100* ($ WO Actual-$ WO Budget)/ ($ WO Budget)	Monthly	Mgr		Spreadsheet; escalate to Mgmt
P2 Yr-to-Date % of Annual Budget Variance	5%	100* ($ Actual-$ Budget)/ ($ Budget)	Monthly	Mgr		Spreadsheet; escalate to Mgmt
P3 % of Invoices paid Timely	TBD	100* (# of Invoices paid timely)-/ (# of Invoices paid)	Monthly	Mgr		Spreadsheet; escalate to Mgmt
Q1 % (Absolute Value) Difference between Budgeted and Actual Costs for Special Taxing Districts	5%	100* (# received within 3 days)/(# Received)	Monthly	Mgr		Spreadsheet; escalate to Mgmt

Approved: _____ Date: _____ Rev #: _____ Rev Date: _____

These measures will be monitored in ActiveStrategy Enterprise.

Define Measure Analyze Improve Control

MIAMI-DADE COUNTY

Identify Lessons Learned

Lessons Learned

1) It was important to follow the data as the team's first assumptions as to the cause(s) of the problem were not correct.

2) The Single Case Bore was very helpful to more clearly see issues that were repeated from the data.

3) QCTools is a great MS Excel add-in and can be used for future problems

Next Steps

Continue to implement countermeasures and monitor performance results.

▪Define ▶ ▪Measure ▶ ▪Analyze ▶ ▪Improve ▪Control

MIAMI-DADE COUNTY