



**Worksheet to Create a Performance Improvement Project Charter**

***What is a project charter?*** A project charter clearly establishes the goals, scope, timing, milestones, and team roles and responsibilities for an Improvement Project (PIP). The charter is typically developed by the QAPI team and then given to the team that will carry out the PIP, so that the PIP team has a clear understanding of what they are being asked to do. The charter is a valuable document because it helps a team stay focused.

However, the charter does not tell the team how to complete the work; rather, it tells them what they are trying to accomplish.

Use this worksheet to define key charter components.

# PROJECT OVERVIEW

**Name of project:**

*Example*: Appropriate cleaner/disinfectants at the point of care on resident/patient units

# Problem to be solved:

*Example:* Staff do not have appropriate cleaner/disinfectants at the point of care that kill the organisms found in our environment. Staff have also not been assigned to specific cleaning/disinfecting responsibilities and have not been held accountable for cleaning and disinfecting equipment and surfaces they use.

# Background leading up to the need for this project:

*Example:*  Environmental audits of cleaning/disinfecting using markings found only 28% of surfaces and equipment in the resident/patient rooms were routinely cleaned and disinfected between June and December 2018. This included rooms and equipment of residents/patients on isolation precautions for drug resistant organisms. The surfaces and equipment include both environmental surfaces and nursing and therapy equipment.

# The goal(s) for this project:

*Example:* Increase the cleaning/disinfecting of surfaces and equipment in resident/patient used on XX unit by 25% by XX/XX/XX.

*[Tip: See Goal Setting Worksheet]*

**Scope**—the boundary that tells where the project begins and ends. The project scope **includes:**

*Example:* Use of interdisplinary cleaning/disinfecting on XX unit.

**PROJECT APPROACH**

# Recommended Project Time Table:

|  |  |  |
| --- | --- | --- |
| **PROJECT PHASE** | **START DATE** | **END DATE** |
| Initiation: Project charter developed and approved |  |  |
| Planning: Specific tasks and processes to achieve goals defined |  |  |
| Implementation: Project carried out |  |  |
| Monitoring: Project progress observed and results documented |  |  |
| Closing: Project brought to a close and summary report written |  |  |

**Project Team and Responsibilities:**

|  |  |  |
| --- | --- | --- |
| **TITLE** | **ROLE** | **PERSON ASSIGNED** |
| **Project Sponsor** | Provide overall direction and oversee  financing for the project |  |
| **Project Director** | Coordinate, organize and direct all activities  of the project team |  |
| **Project Manager** | Manage day-to-day project operations,  including collecting and displaying data from the project |  |
| **Team members\*** |  |  |
|  |  |  |

\*Choice of team members will likely be deferred to the project manager based on interest, involvement in the process, and availability.

**Material Resources Required for the Project** (e.g., equipment, software, supplies):

# Barriers

|  |  |
| --- | --- |
| **What could get in the way of success?** | **What could you do about this?** |
| *Example:* Staff has not been trained to use cleaning/disinfecting products | *Example:* Educate staff on the correct use of products; collect data on compliance with cleaning/disinfecting. |
| *Example:* Staff think other departments should be responsible for cleaning/disinfecting. | *Example:* Focus on teaching about the importance of a clean environment to control MDRO and XDRO Assess if additional hands-on-deck are needed during  busy times on unit. |
|  |  |
|  |  |
|  |  |

**PROJECT APPROVAL**

The signatures of the people below relay an understanding and approval of the purpose and approach to this project. By signing this document you agree to establish this document as the formal Project Charter and sanction work to begin on the project as described within.

|  |  |  |  |
| --- | --- | --- | --- |
| **TITLE** | **NAME** | **SIGNATURE** | **DATE** |
| Administrator |  |  |  |
| Project Sponsor |  |  |  |
| Project Director\* |  |  |  |
| Project Manager\* |  |  |  |

\*May not always have both roles.