



What is a project charter? A project charter clearly establishes the goals, scope, timing, milestones, and team roles and responsibilities for a Performance Improvement Project (PIP). The charter is typically developed by the Quality Assurance & Performance Improvement (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: Reduction in use of position change alarms

Problem to be solved:

Example: Alarms going off frequently detract from a homelike environment and may give staff members a false sense of security.

Background leading up to the need for this project:

Example: Residents and families have complained about the sound of alarms going off frequently. Staff members feel pressure to do “something” when a resident falls.

[Tip: Reference specific background documents, as needed.]

The goal(s) for this project:

Example: Decrease the percentage of residents with position change alarms 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 position change alarms 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 and infection prevention and control duties | |
| 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? |
|---|---|
| <i>Example:</i> A resident could fall and staff members could automatically blame the lack of an alarm. | <i>Example:</i> Educate staff members on the lack of relationship between alarms and falls; collect data on removal of one alarm at a time. |
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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.

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