

Performance Improvement Project Charter

A project charter clearly establishes the goals, scope, timing, milestones and team roles and responsibilities for an improvement project. The charter is a valuable document because it helps a team stay focused. Use this worksheet to define key charter components.

Project Overview

Name of project:

Problem to be solved:

Background leading up to the need for this project:

The goal(s) for this project:

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

Project Approach

Recommended Project Timetable:

| 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 ended, and summary report written | | |

| Project Team and Responsibilities: | | |
|---|---|-----------------|
| Recommended Project Timetable: | | |
| 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* | | |
| | | |
| | | |
| 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? |
| | |

| 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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