



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: 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 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 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	
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 could automatically blame the lack of an alar.	<i>Example:</i> Educate staff on the lack of relationship between alarms and falls; collect data on removal of one alarm at a time.
<i>Example:</i> Staff complaints of need for additional staff to watch everyone if alarms are removed.	<i>Example:</i> Focus on anticipation of resident needs, and 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.

[Disclaimer: Use of this tool is not mandated by CMS, nor does its completion ensure regulatory compliance.](#)