**Improvement Project Charter Assessment Form**

**Project Lead: Project Name:**

**Name of Coach/Project Charter Assessor:**

**Assessment of the Key Criteria required for success:**

**Score Definition**

 **1 Criteria not fulfilled at all**

 **2 Criteria fulfilled to a small extent with significant gaps remaining**

 **3 Criteria is somewhat fulfilled but there are gaps**

 **4 Criteria fulfilled to a large extent, minimal gaps**

 **5 Criteria is completely fulfilled or Not Applicable to the project**

**WHAT ARE WE TRYING TO ACCOMPLISH?**

|  |  |  |
| --- | --- | --- |
| **Key Criteria for Success** | **Score** | **Comment**  |
| Aim relates to the LOIP/ Locality Plans. |  |  |
| Charter description clearly states need for improvement. |  |  |
| Expected impact on organisation and/ or customer is clear |  |  |
| Improvement clearly points to process, product or service or sub-system improvement |  |  |
| Expected outcomes are clear and the team will know when it has completed the project |  |  |
| Specific, numerical goals to be attained. |  |  |
| Project can be completed within time frame |  |  |

*Total: \_ out of possible 35*

**HOW WILL WE KNOW A CHANGE IS AN IMPROVEMENT?**

|  |  |  |
| --- | --- | --- |
| **Key Criteria for Success** | **Score** | **Comment**  |
| An appropriate family of measures is identified |  |  |
| Measures identified are directly related to the project description, objectives, and goals |  |  |
| Historical data exist on performance of the process or product to be improved |  |  |
| Outcome, process, and balancing measures are specified |  |  |
| Measures can be collected at intervals frequent enough to assess progress on the project  |  |  |
| Improvement in the project measures can reasonably be expected within project time frame |  |  |

*Total: \_ out of possible 30*

**WHAT CHANGES CAN WE MAKE WHICH WILL RESULT IN IMPROVEMENT?**

|  |  |  |
| --- | --- | --- |
| **Key Criteria for Success** | **Score** | **Comment**  |
| Specific issues to investigate and/or alternatives to consider are given |  |  |
| A concept design or change package is identified |  |  |
| Project constraints are defined including what is NOT to be addressed |  |  |
| Project is tied to specific processes or sub-systems |  |  |
|  Initial activities or PDSA cycles are suggested |  |  |

 *Total: \_ out of possible 25*

**TEAM MEMBERSHIP**

|  |  |  |
| --- | --- | --- |
| **Key Criteria for Success** | **Score** | **Comment**  |
| All appropriate subject matter knowledge is represented on the improvement team |  |  |
| Process owner (authority to make changes) is represented or Sponsor of team |  |  |
| People with detailed knowledge of the targeted system are on the team |  |  |
| Patients, customers or suppliers are on the team |  |  |
| **TOTAL RATING** |  |  |

*Total: \_ out of possible 20*

**Total Evaluation Rating**

 > 85 Good Project charter definition

66-85 Consider improving or clarifying the project charter (see low ratings)

< 65 Rework or Re-evaluate the need for this improvement charter