**PDSA Project Charter Worksheet**

***Scenario 1: Assigned Topic for Project***

Description: A project sponsor has approached you to be the team leader of a workgroup addressing a problem or implementing a new initiative.

Steps:

1. Meet with project sponsor: gather input to begin filling out part 1 of the charter.
2. Recruit an effective team. Use the Team Formation guide in the PDSA toolkit to recruit team members and host a kickoff meeting. At the kickoff meeting, part 1 of the charter will be reviewed, and team input added to the project sponsor’s initial guidance.
3. The project lead should schedule 1-2 team meetings. At these meeting(s), the team should complete part 2 of the charter using activities from the PDSA toolkit. Fill out associated charter sections as indicated below.
4. The PDSA team lead should continue to review the charter and update sections as needed as PSDA tests are completed.
5. The PDSA team lead should use the charter and PDSA forms to report on team progress to the project sponsor. Continue to gather project sponsor input in case adjustments are needed.

**Background:** The charter is a living document defining the focus of an improvement project. Update the charter continually with learnings from your smaller PDSA tests of change.

**Directions:** **Follow the steps below depending on your scenario.**

***Scenario 2: Internal Project***

Description: You or a co-worker has identified an issue to be addressed, a training opportunity to be implemented, or an existing process that could be improved.

Steps:

1. Recruit an effective team. Use the team formation guide in the PDSA toolkit to recruit team members and host a kickoff meeting. At the kickoff meeting, part 1 of the charter will be completed as well as the Goal Statement from part 2 of the charter, if time allows.
2. The project lead should schedule 1-2 team meetings. At these meeting(s), the team should complete part 2 of the charter using activities from the PDSA toolkit. Fill out associated charter sections as indicated below.
3. The PDSA team lead should continue to review the charter and update sections as needed as PSDA tests are completed.
4. The PDSA team lead should use the charter and PDSA forms to communicate with leadership and co-workers about the team’s work.

**CHARTER**

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|  | **Name of the PDSA Project:** Click or tap here to enter text. |
| **PART 1** | **General description (What are we trying to accomplish?):** Click or tap here to enter text. |
| **Reason for event (Why is this important to our agency and/or our clients?):** Click or tap here to enter text. |
| **Boundaries & Scope (What are the limits on the project? Time? Resources?):** Click or tap here to enter text. |
| **Timeline:** Click or tap here to enter text. |
| **Team Membership**  **Team Members:** Click or tap here to enter text.  **Team Leader:** Click or tap here to enter text.  **Sponsor:** Click or tap here to enter text.  **Support/Resource People (if applicable):** Click or tap here to enter text. |
| **PART 2** | **Goal Statement(s) (see Goal Setting tool):** Click or tap here to enter text. |
| **Problem Statement(s) (see Problem Exploration tool):** Click or tap here to enter text. |
| **Expected Outcomes/Deliverables (see Test of Change Selection tool):** Click or tap here to enter text. |
| **Measurements (see Measuring Change tool):** Click or tap here to enter text. |