



Improvement Charter

Improvement Name:			
Team Member Names	Position/Job	Phone	Email
Sponsor:			
Manager:			
Staff Members:			
Data Manager:			
Caucus Members:			
CI-Practitioners:			

System/Process/Issue Background Description:

Product(s)/Service(s):

Customers/Clients:

Supplier: (upstream)

<u>Boundaries / Improvement Scope:</u> <u>First Step:</u>	<u>Last Step:</u>
<u>Scope:</u>	



Problem Statement:

Ideal Situation:

Improvement Effort & Work/Process Measurement:		
Target Objectives	Specific Measurements:	Timeframe:
<u>Improvement Event:</u>		
1.	1.	1.
2.	2.	2.
3.	3.	3.
<u>Improvement Project:</u>		
1.	1.	1.
2.	2.a. 2.b.	2.a. 2.b.
3.	3.	3.
4.	4.	4.
5.	5.a. 5.b.	5.a. 5.b.

Resources Available:

Role Expectations: *(Note expectations around decision-making and implementation)*



Improvement Effort & Work/Process Deliverables:		
Objectives	Expected Deliverables	Timeframes
<u>Improvement Event</u>		
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4..	4.
<u>Improvement Process/Problem/Design Project</u>		
1.	1.	1.
2.	2.	2.
3.	3.a. 3.b.	3.
4.	4.	4.
5.	5.	5.

Improvement Effort Charter – Definitions and Examples

Improvement/Process Name: A brief name for the problem, challenge, or system/process for which the improvement intervention is being conducted. The charter describes what the team is about to address.

Improvement Team:

Sponsor: The person (the “owner”) with overall responsibility for the intervention and its implementation; responsible for removing barriers (for getting to YES).

Manager: The person responsible for managing the implementation of the plan and with the authority to implement it.

Other Staff Team Members: Other staff Team members – the staff who actually do the work and also others up and downstream who affect or are affected by the work, as well as customers.

Data Manager: The person who will be responsible for assisting the other team members to calculate and track the measurements.

Caucus Group Members: The resource staff who can be called on for specific expertise or other support as needed.

CI-P: The *Bend the Curve* Continuous Improvement Practitioners designated to work with and mentor the Sponsor, Manager, and team in planning, conducting, and following up on the requested intervention.

Background: A brief contextual description for the problem/challenge/process being proposed for improvement, including its purpose/mission.

Product/Service: The material, information, item, service, etc. demanded/wanted by the customer and produced/transformed by this specific work/process.

- A product is something created/transformed by work (the process activities) which can be given to someone else (the customer) to achieve a desired outcome/result. It is the bridge between the activities/tasks and the outcome/result.
- It is specific and must be -
 - a noun,
 - a deliverable,
 - countable, and
 - expressed as something that can be made plural with an “s”.
- A product has both **attributes/characteristics** (“A satisfying [*Product name*] is one that is” Characteristics such as *timely, flexible, cheap, easy to use*) and **features** (*bring attributes to life, such as 24/7, electronic format, multi-language options, etc.*).
- A process may have more than one product.



Customer(s): Identifies the customer(s) of this work/process, both internal and external to the work/process itself. Be clear about who the actual end user of the product/service is.

- The customer can be determined only in relation to a specific product. Once you are clear about the product, you can determine who the customer(s) is.
- Not all customers are the same. Customers can play different roles with a product. Some are end-users, some are brokers, and some are fixers.
- The goal is to satisfy end-users first, then to worry about the others.

End-user -- The customer for whom the product is primarily intended. This customer will personally use the product to achieve a desired outcome. They actually receive it and use it to achieve a specific result -- and not some other product.

Broker -- A customer who acts as an agent of the end-user and / or the producer. This person does not personally use the product. As an agent of the end-user, the broker makes the product more accessible, easier to use, and more appealing. As an agent of the producer, the broker "encourages" the user to accept the product.

Fixer -- Any customer who will have to make repairs, corrections, modifications, or adjustments to the product at any point in its cycle for the benefit of the end user.

Supplier: The internal and/or external persons/entities that provide information, documents, supplies, people, etc. for the work/process.

Boundaries of this Process – and/or - Improvement Scope: Defines specifically where this work/process begins and ends for the purposes of this intervention. The first & last steps in a process and/or a specific description of the scope of the work to be addressed.

Problem Statement: The reason(s) -- with specific analysis and relevant data to provide needed (baseline) information -- you want to change/improve/create this work/process. And what you want to change, improve, or design/create.

Ideal Situation: A brief description of what the ideal situation would be for the improved process/problem/design. Identify in the measurements below how you will know if you are successful in achieving this state or in making progress toward it and whether or not it is an improvement.



Measurements: (See examples below.)

Target Objectives	Specific Measurements	Timeframe
<u>Improvement Event</u>		
1. To reduce the time it takes for the whole process.	1. Reduce the lead time by ____%.	(FS Date) & 90 Days
2. To simplify the process flow.	2. Reduce the number of process steps by ____%.	(FS Date) & 30 Days
<u>Project Process/Problem/Design</u>		
1. To increase the number of customers served in a timely way.	1.a Increase the number of customers served within one week of request by ____%.	90 Days
	1.b Over time, consistently continue to increase the number of customers served in a timely way by at least ____%.	Monthly
	1.c Over time, consistently continue to decrease the actual amount of time spent waiting by customers after request by at least ____%.	Monthly
2. Improve the collection and availability of project implementation/ measurement data/information.	2.a Update all improvement data on a daily basis all the time.	60 Days
	2.b.	
3. To reduce errors and re-work, improving the quality of the work.	3. Increase the first-past-yield % by ____%.	60 Days
4. To reduce the staff time required in order to free up resources for other work.	4. Reduce staff time by ____%.	30 Days
5. To reduce associated costs, increasing savings available for improving services.	5. Decrease changeover time by ____%.	30 Days

Resources/Budget: Identifies human, fiscal, and other resources available to the improvement project team and project process.



Role Expectations: Describes expectations about authority and responsibility in relation to decision-making and implementation.



Improvement Effort/Process Deliverables: Concise description of deliverables expected.
 (See examples below.)

Objectives	Expected Deliverables	Timeframe
<p><u>Improvement Event</u></p> <p>1. To facilitate team to analyze current process state.</p> <p>2. To facilitate team analysis of current state to identify process improvements.</p> <p>3. To facilitate team development of an action/change plan to implement identified improvements.</p>	<p>1. Draft Current State Map.</p> <p>2. Draft Future State Map.</p> <p>3. Draft Improvement Implementation Plan</p>	<p>(CS Date)</p> <p>(FS Date)</p> <p>(IP Date)</p>
<p><u>Improvement Process/Problem/Design</u></p> <p>1. To assure implementation of the improvement action plan.</p> <p>2. To evaluate effectiveness of changes for efficiency, effectiveness, & quality.</p> <p>3. To identify needed areas of improvement</p>	<p>1.a. Updated, current Improvement Plan(s).</p> <p>1.b. Documentation of implemented Future State.</p> <p>2. Documentation of regular and ongoing tracking, analysis.</p> <p>3. Published analysis of customer and program / process outcomes.</p>	