Continuous Improvement Strategies

Process Improvement Special Interest Group (SIG)

2026 Programming

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Welcome!


THE PROJECT CHARTER IN ACTION:
A Comprehensive View of Pre-Charter, Charter and Post-Charter Improvement Activities
Tuesday, June 23
12:00 noon - 1:30 p.m. CDT
DFWHC FOUNDATION
VIRTUAL EVENT

The Project Charter in Action: Housekeepping

- All attendees are in listen only mode
- Recording session
- Type your questions into Q&A or Chat
- This education event has been approved for 1.5 CPHQ
- QR code at end of session to do evaluation and claim CE’s

Introduction to Co-Chairs

Shernette R. Kydd, PhD, PE

- Education
  - ✓ B.S. Mechanical Engineering
  - ✓ M.B.A.
  - ✓ Ph.D. Industrial Engineering
- Relevant Certifications
  - ✓ LSSGB, LSSBB, Lean Bronze, LSSMBB
  - ✓ CPHQ
  - ✓ Professional Engineer (PE)
- Experience
  - ✓ > 25 years (Manufacturing/Engineering)
  - ✓ > 10 years (in Healthcare)
  - ✓ Adjunct Professor at UTA (Industrial Engineering Department)

Tanya Stinson, MSHQ, LSSMBB

- Education
  - ✓ B.A.A.S. in Business and Technology
  - ✓ Masters Healthcare Quality and Safety
- Relevant Certifications
  - ✓ LSS, LSSGB, Lean Champion, LSSMBB
  - ✓ Prosci Change Management Practitioner
  - ✓ ROI Methodology Cert.
  - ✓ Masters Business Analysis Cert.
- Experience
  - ✓ > 15 years (started with Luminant, TXU)
  - ✓ > 10 years (in Healthcare)
  - ✓ Owner of Leaning Towards Change, LLC

Pre Song Survey


CHART
GUIDING LIGHT
PROCESS IMPROVEMENT

Post Song Survey

Pre-Project Charter Objectives

Building a Structured Approach to Identifying and Validating Improvement Opportunities

Training Objectives

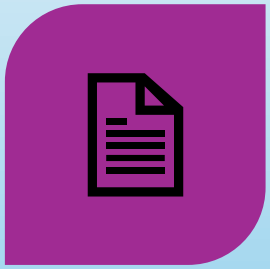
- How to look for problems
- What to do when you find one
- Whom to contact regarding your findings
- How to validate the problem
- How to analyze the data (if available)
- How to ensure the issue is significant enough to warrant assembling an expert team for resolution

How to Look for Problems

OBSERVE WORKFLOWS AT THE GEMBA

IDENTIFY DELAYS, DEFECTS, REWORK, AND SAFETY RISKS

LISTEN TO EMPLOYEE AND CUSTOMER CONCERNS



DOCUMENT INEFFICIENCIES AND WASTE PATTERNS

What to Do When You Find One

01

Document the issue clearly

02

Capture evidence and examples

03

Avoid assumptions before validation

04

Escalate through the correct process

Whom to Contact

Notify leadership or process owners

Engage quality or operational excellence teams

Communicate findings professionally

Ensure accountability for follow-up

How to Validate the Problem

- Verify the issue occurs consistently
- Collect observations and supporting evidence
- Compare current vs. expected performance
- Determine impact on quality, safety, cost, or experience

How to Analyze Available Data

REVIEW TRENDS AND PERFORMANCE METRICS

USE PARETO CHARTS, RUN CHARTS, AND BASIC ANALYSIS TOOLS

IDENTIFY ROOT CAUSES AND CONTRIBUTING FACTORS

LOOK FOR MEASURABLE PATTERNS

Determining if the Issue Warrants a Team

ASSESS OPERATIONAL AND FINANCIAL IMPACT

EVALUATE FREQUENCY AND SEVERITY

DETERMINE IF CROSS-FUNCTIONAL EXPERTISE IS REQUIRED

PRIORITIZE ISSUES THAT AFFECT QUALITY, SAFETY, AND CUSTOMER EXPERIENCE

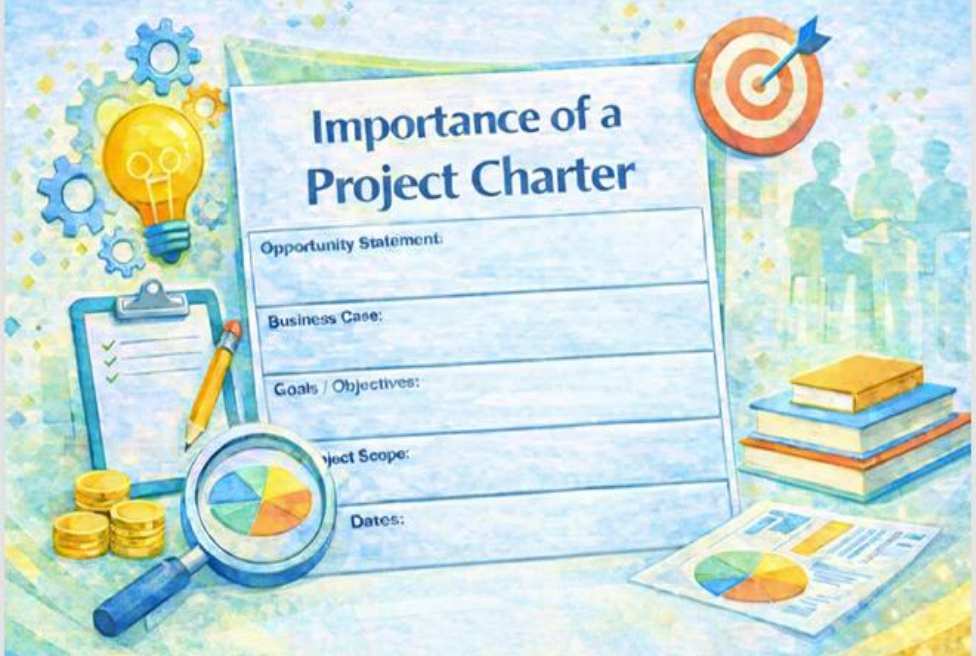
Key Takeaways

- Problems should be identified proactively, not reactively
- Validation is essential before escalation
- Data-driven decision making improves outcomes
- Structured problem-solving prevents wasted effort
- Cross-functional collaboration drives sustainable improvement

CookChildren's

Project Charter

Development Guide



Shernette R. Kydd, PhD, PE, LSSMBB

TABLE OF CONTENTS

BACKGROUND

A project charter is a Foundation for Operational Excellence Improvement

Operational Excellence (OpEx) improvement efforts succeed or fail based on clarity. Before tools are applied, teams convened, or data collected, there must be a shared understanding of what problem is being addressed, why it matters, and how the organization will approach it. The Project Charter serves as this foundational document.

A Project Charter is a formal, structured agreement that defines and authorizes a process improvement effort. It establishes a common understanding among leaders, sponsors, and team members regarding the scope, objectives, governance, and expectations of the project. In OpEx work—where improvement efforts often cross departments, roles, and systems—the charter provides discipline, alignment, and focus.

WHAT IS A Project CHARTER

A Project Charter is a concise but comprehensive document that formally initiates an improvement project. It describes the current problem or opportunity, articulates the rationale for addressing it, defines measurable objectives, establishes boundaries, and identifies leadership roles, team members, and customers. It also outlines timing expectations and clarifies how value will be assessed.

Importantly, the charter is not a solution document. It does not prescribe fixes or future-state designs. Instead, it creates a stable framework within which structured problem-solving can occur using methodologies such as Lean, Six Sigma, PDSA, or A3 thinking.

Importance of a Project Charter

In Operational Excellence, improvement work often competes with daily operational demands. Without a charter, projects are vulnerable to:

- Scope creep and shifting priorities
- Misalignment between leadership and teams
- Premature solution implementation
- Unclear accountability and ownership
- Difficulty sustaining results

The Project Charter addresses these risks by:

- Creating organizational alignment around the problem and purpose
- Establishing clear governance and accountability
- Ensuring goals are data-driven and measurable
- Defining what is in scope and out of scope
- Providing a reference point throughout the project lifecycle

A well-developed charter increases the likelihood that improvement efforts are intentional, resourced appropriately, and aligned with strategic and operational goals.

A DYNAMIC DOCUMENT

While the Project Charter is developed at the outset, it is not static. It serves as a living reference throughout the improvement effort, helping teams remain anchored to the original intent while navigating discovery, analysis, and change. When thoughtfully constructed, the charter becomes a powerful tool for focus, alignment, and accountability—hallmarks of Operational Excellence.

At Cook Children's, the project charter is formally locked down prior to the improvement implementation phase. This governance step ensures stability in scope, objectives, and accountability before solutions are tested or implemented.

COOK CHILDREN'S Basic PROJECT CHARTER

CookChildren's.

Opportunity Statement:	**Dates:**
	Champion:
Business Case:	**Project Leader:**
	Mentor:
Goals / Objectives:	**Team Members:**
Project Scope:	**Customers:**
Document at Project Closure **Return on Investment (ROI) Annualized:** Capture a brief description and the annualized financial savings.	***Document at Project Closure*** **Return on Mission (ROM):** Capture a brief description of the value created.

The template presented above is the standard project charter used at Cook Children's and has proven effective in supporting our Operational Excellence efforts. Organizations are encouraged to adapt and customize the template as needed to align with their own structure, culture, and improvement needs—make it your own.

OPPORTUNITY STATEMENT SECTION

Purpose

The Opportunity Statement (also referred to as the Problem Statement) provides an objective, factual description of an existing issue in a process or system.

Its sole purpose is to:

- Define what problem exists
- Describe the current state
- Establish clear boundaries for investigation

Core Question

What problem or issue exists in the current process or system?

Required Characteristics

A strong opportunity/problem statement is:

- Fact-based and observable
- Neutral and non-judgmental
- Focused on process or system behavior

What Does NOT Belong in the Opportunity / Problem Statement

- ✗ Impact or consequences
- ✗ Justification or benefits for solving the problem
- ✗ Strategic alignment
- ✗ Root cause assumptions
- ✗ Proposed solutions or goals
- ✗ Future state language
- ✗ Speculative or anecdotal language

Key Elements & Guiding Questions

1. Problem Description – What Is Happening?

Describe the issue exactly as it occurs today.

Guiding questions:

- What process, workflow, or system is experiencing difficulty?
- What is happening or not happening?
- Where in the process does the issue occur?
- When does the issue typically arise?

2. Scope – Where and for Whom Does the Problem Occur?

Clarify the boundaries of the issue.

Guiding questions:

- Which areas, roles, or populations are affected?
- Is the problem recurring or intermittent?
- Are there known conditions under which it occurs?

3. Evidence – How Is the Problem Observed or Known?

Describe how the issue is visible or verifiable.

Guiding questions:

- What data, reports, observations, or records indicate the problem exists?
- Are there known measures or documented observations?
- Is the issue consistently reported or observed?

4. Magnitude – How Large or Frequent Is the Problem?

Characterize the size, frequency, or duration of the issue, if known.

Guiding questions:

- How often does the issue occur?
- How long has it been occurring?
- Is there notable variability?

BUSINESS CASE SECTION - PART 1

Purpose

The Business Case explains why the identified problem should be addressed. It translates the problem into organizational relevance, showing how the issue:

- Impacts strategic objectives
- Affects operational performance
- Creates risk, inefficiency, or lost opportunity
- Warrants investment of time and resources

While the opportunity statement is descriptive, the business case is persuasive—grounded in evidence, not emotion.

Core Question

Why is it important for the organization to solve this problem?

Required Characteristics

A strong business case is:

- Clearly linked to organizational strategy
- Grounded in observable impact
- Balanced (not overstated)
- Written in business and operational language
- Understandable to executive and frontline audiences

Key Elements & Guiding Questions

1. Strategic Alignment – Why Does This Matter Now? Explain how the problem interferes with achieving strategic goals.

Guiding questions:

- Which strategic priorities, pillars, or initiatives are affected?
- How does this issue hinder performance, growth, or reliability?
- Is the problem misaligned with stated organizational values or goals?

2. Operational Impact – How Does the Problem Affect Performance? Describe how the issue influences day-to-day operations.

Guiding questions:

- How does the problem affect workflow, capacity, or throughput?
- Does it contribute to delays, rework, or variability?
- Are staff required to use workarounds?

3. Financial or Resource Impact – What Is at Stake?

Describe known or estimated resource implications.

Guiding questions:

- Does the problem affect cost, revenue, or resource utilization?
- Are there inefficiencies tied to labor, supplies, or time?
- Does the issue limit the organization's ability to scale or sustain operations?

(High-level estimates are acceptable; precision is not required at this stage.)

BUSINESS CASE SECTION - PART 2

The Business Case establishes a shared understanding among leadership and project stakeholders by grounding the problem in observable facts, trends, and impacts rather than anecdotal experience.

While the opportunity statement defines *what* the problem is, the Business Case persuasively explains why solving it matters to the organization, providing the justification needed to prioritize, fund, and initiate the project.

Core Question

Who is impacted and how are they affected?

What Does NOT Belong in the Business Case

- ❌ Detailed solutions or designs
- ❌ Tool selection (DMAIC, PDSA, etc.)
- ❌ Detailed ROI calculations
- ❌ Root cause conclusions
- ❌ Speculative or anecdotal language

Key Elements & Guiding Questions

4. Risk and Compliance Considerations – What Exposure Exists?

Identify risks associated with the problem remaining unresolved.

Guiding questions:

- Are there patient safety, quality, or regulatory risks?
- Does the issue increase operational or reputational risk?
- Could the problem worsen if left unaddressed?

5. Opportunity Cost – What Is Lost by Inaction?

Explain what the organization cannot fully achieve because the problem persists.

Guiding questions:

- What strategic initiatives are constrained?
- What performance gains remain unrealized?
- What capacity or capability is underutilized?

GOALS/OBJECTIVES

Purpose

The Goals / Objectives section defines how success will be measured by translating the problem into quantifiable performance targets.

This section:

- Quantifies the extent of the problem
- Establishes a fact-based baseline
- Defines measurable improvement targetsCreates accountability for outcomes

Goals are not activities and not solutions. They are measurable performance outcomes.

Core Question

Are there any quantifiable performance targets to measure success?

Required Characteristics

Well-defined goals and objectives are:

- Data-based
- SMART (Specific, Measurable, Achievable, Relevant, Time-bound)
- Anchored in a clearly defined baseline
- Expressed in nominal values, rates, or percentages
- Directly traceable to the problem statement

What Does NOT Belong in the Goals/Objectives Section

✗ Actions or interventions
✗ Tool selection
✗ "Improve" without quantification
✗ Vague terms (e.g., faster, better, more efficient)
✗ Outcomes not traceable to the problem

Key Elements & Guiding Questions

1. Primary Objective: The primary objective represents the main performance outcome the project is accountable for improving. There should be one primary objective whenever possible.

Each objective must clearly state:
Performance Measure: What is being measured?
Baseline: Current performance level (fact-based)
Improvement Target: Desired performance level
Timeframe: When the target will be achieved
Scope: Where the measurement applies

2. Guiding Questions for Goal Development
Quantification
- *What metric best reflects the problem described?*
- *Is the metric operationally defined?*
- *Is the data source reliable and accessible?*

Baseline
- *What is the current average, rate, or distribution?*
- *Over what time period was the baseline calculated?*
- *Is there known variation?*

Target
- *What level of improvement is realistic and meaningful?*
- *Is the target absolute (minutes, counts) or relative (percentage)?*
- *Does the target align with organizational expectations or benchmarks?*

Time
- *By what date or timeframe will the improvement be achieved?*
- *Is this aligned with governance or reporting cycles?*

SMART Criteria Applied to Charter Goals
Specific - Metric and population clearly defined
Measurable - Baseline and target stated numerically
Achievable - Target is realistic given constraints
Relevant - Metric ties directly to the problem
Time-bound - Target date or period specified

Acceptable Forms of Measurement
- *Objectives may be expressed as:*
- *Counts (number of defects, delays, events)*
- *Time (minutes, hours, days)*
- *Rates (per 100 visits, per case)*
- *Percentages*
- *Ratios*
- *Compliance percentages*
- *Both nominal and percentage-based measures are acceptable*

SCOPE

Purpose

The Scope section defines the boundaries of the project by clearly stating what processes, resources, people, and organizational areas will be considered during the work.
Its purpose is to:

- Prevent scope creep
- Set clear expectations for stakeholders
- Establish focus and feasibility
- Ensure alignment with the defined problem and goals
-

Scope defines where the team will look, not what solutions will be implemented.

Core Question

What parts of the organization and process are included in this project?

Required Characteristics

A well-defined scope is:

- Specific and bounded
- Aligned with the problem statement and goals
- Feasible within the project timeframe
- Clearly understood by stakeholders
- Focused on processes and systems, not individuals

What Does NOT Belong in the Scope Section

✗ Solutions or interventions
✗ Performance targets (already defined in Goals)
✗ Root cause analysis
✗ Individual performance evaluation
✗ Future state design

Key Elements & Guiding Questions

1. Process Scope – What Work Is Included?
Define the processes or workflows that will be examined.
- Which process(es) are included?
- Where does the process start?
- Where does the process end?
- Are handoffs or interfaces included?

2. Organizational Scope – Which Areas Are Included?
Identify the departments, units, or functions involved.
- Which departments participate in or influence the process?
- Are support functions included?
- Are external partners or vendors included?

3. People & Roles – Who Is Involved?
Clarify which roles or groups fall within scope. Scope roles, not individuals.
- Which staff roles interact with the process?
- Are leadership or oversight roles included?
- Are patients, families, or customers part of the scope?

4. Resource Scope – What Resources Are Considered?
Define the resources relevant to the project.
- Are staffing levels, scheduling, or workload included?
- Are technology systems in scope?
- Are physical space or equipment considered?

5. Data & Metrics Scope – What Data Will Be Used?
Clarify the data sources relevant to analysis.
- What systems or reports will provide data?
- What timeframe of data will be analyzed?
- Are qualitative inputs (observations, interviews) included?

TIMELINE

Purpose

The Timeline section establishes the expected duration of the project by identifying:

- The projected start date (formal project kickoff)
- The projected closure date (when objectives are expected to be met)
-

Its purpose is to:

- Set realistic expectations for stakeholders
- Support prioritization and resource planning
- Provide governance-level visibility

Core Question

When is the project expected to begin and when is it expected to conclude?

Required Characteristics

A well-defined timeline:

- Includes a clear start and end date
- Reflects realistic duration given scope and complexity
- Aligns with organizational planning and reporting cycles
- Avoids unnecessary task-level detail

What Does NOT Belong in the Timeline Section

❌ Task-level schedules
❌ Individual assignments
❌ Detailed phase deliverables
❌ Solution implementation plans
❌ Post-project monitoring plans

Key Elements & Guiding Questions

1. Projected Start Date (Kickoff)

The projected start date represents:

- Formal project kickoff
- Team alignment and charter approval
- Authorization to begin work

Guiding considerations:

- Availability of key stakeholders
- Data access readiness
- Governance approvals

2. Projected Closure Date

The projected closure date represents:

- Completion of analysis and improvement work
- Validation of goal attainment
- Formal project closeout

Closure is defined by achievement of objectives, not by completion of activities.

PROJECT CHAMPION & EXECUTIVE SPONSOR

Purpose

The Project Champion provides leadership ownership and accountability for the project. This role ensures the work remains aligned with organizational priorities and has the authority to remove barriers.
In some cases, an Executive Sponsor is also identified to provide enterprise-level support and escalation.

Core Question

Who has the authority and accountability to support, prioritize, and sustain this project?

An Executive Sponsor should be identified when:

- The project spans multiple departments or service lines
- Strategic priorities or significant resources are involved
- Organizational policy, structure, or funding decisions may be required
- Risk exposure is high

Role Definition

The Project Champion is typically a Director-level leader or above who:

- Owns the problem from a business or operational perspective
- Advocates for the project's priority
- Ensures alignment with departmental and organizational goals
- Supports resource availability
- Removes barriers beyond the team's control

The Project Champion is not responsible for day-to-day project execution.

Information to Capture

- Name
- Title
- Department / Function

Executive Sponsor (If Applicable)

Role Definition

The Executive Sponsor is a senior executive leader (e.g., Vice President, Chief Officer) who:

- Provides enterprise-level sponsorship
- Ensures alignment with strategic priorities
- Supports cross-functional coordination
- Serves as an escalation point for unresolved issues
- Reinforces accountability across departments

The Executive Sponsor is engaged at key decision points, not in daily work.

PROJECT LEADER

Purpose

The Project Leader is responsible for leading and managing the project work from kickoff through closure. This role ensures that milestones are planned, tracked, and completed in alignment with the approved timeline.

The Project Leader is accountable for execution, not sponsorship.

Core Question

Who is responsible for managing the project's day-to-day progress and milestones?

Preferred Qualifications

While not required in all cases, it is strongly preferred that the Project Leader has formal process improvement training, as this supports disciplined problem-solving and data-driven execution.

Role Definition

The Project Leader

- Leads the project from kickoff to closure
- Manages the project timeline and milestones
- Coordinates project activities across involved stakeholders
- Tracks progress against defined goals and objectives
- Escalates risks, issues, or barriers as needed
- Facilitates meetings, reviews, and updates

The Project Leader may be a:

- Process Improvement professional
- Clinical or operational leader
- Project manager

Subject matter leader with project accountability

Authority & Accountability

The Project Leader:

- Has responsibility for planning and coordination
- Does not require line authority over all participants
- Operates with support from the Project Champion and Executive Sponsor

Information to Capture

- Name
- Title
- Department / Function
- Role Type (optional, e.g., PI Lead, Clinical Lead, PM)

PROJECT TEAM MEMBERS

Purpose

The Project Team Members section identifies the individuals who will actively participate in the project and contribute subject-matter knowledge of the process, system, or issue being addressed.

Team members are selected because they:

- Have direct knowledge of the current process
- Represent key process touchpoints
- Can provide operational insight, data, and practical context

This section ensures the project is grounded in real-world workflow understanding.

Core Question

Who has firsthand knowledge of the process and should be involved in this project?

Team Composition Guidance

To maintain effectiveness:

- Include only **relevant roles**
- Avoid over-representation from a single function
- Balance operational staff with support functions (as needed)
- Keep the core team manageable (typically 5–10 members)

Role Definition

Project Team Members:

- Participate in project meetings and working sessions
- Provide insight into current-state workflows and constraints
- Assist with data validation and interpretation
- Contribute to testing and refinement of changes (as applicable)

Team members are contributors, not sponsors or project managers.

Selection Criteria

Team members should:

- Be directly involved in or affected by the process
- Represent different process touchpoints or handoffs
- Have sufficient availability to participate meaningfully
- Reflect cross-functional perspectives when applicable

Information to Capture for Each Team Member

For each individual listed, capture:

- Name
- Job Title
- Department / Function

Process Touchpoint / Role (how they interact with the process)

PROJECT MENTOR

Purpose

The Project Mentor provides methodological guidance and quality oversight to ensure the project is executed using a disciplined, structured improvement framework.
The mentor supports the Project Leader and team by:

- Reinforcing proper application of improvement methods
- Ensuring analytical rigor
- Preventing solution jumping
- Supporting sustainability and control planning

The Project Mentor does **not** manage the project and does not own outcomes.

Core Question

Who provides expert guidance on the improvement framework being used?

Required Qualifications

Team Composition Guidance
The Project Mentor must be formally certified in at least one structured improvement framework.
Acceptable certifications include (but are not limited to):

- Lean Six Sigma (Green Belt, Black Belt, Master Black Belt)
- Lean Practitioner / Sensei
- Equivalent recognized improvement framework certification

Certification ensures the mentor can:

- Validate correct tool usage
- Guide statistical and process analysis

Uphold discipline across project phases

Role Definition

The Project Mentor:

- Advises the Project Leader on use of the selected improvement framework
- Reviews key project deliverables for methodological integrity
- Provides coaching on data analysis and problem-solving tools
- Helps ensure alignment with organizational improvement standards

Supports readiness for tollgates or governance reviews

Authority & Accountability
The Project Mentor:

- Has advisory authority only
- Does not make business decisions
- Does not replace the Project Champion or Leader
- Escalates methodological concerns when necessary

CUSTOMER

Purpose

The Identified Customer(s) section defines who receives the output of the process and who is impacted by its performance.
Customers may be:

- External (patients, families, clients, partners)
- Internal (employees, departments, downstream teams)
-

This section clarifies for whom the process exists and helps guide later analysis of requirements and performance.

Core Question

Who receives or is directly impacted by the output of this process?

Information to Capture

For each identified customer, capture:

- Customer Type (Internal or External)
- Customer Group or Role
- Relationship to the Process (how they receive or are affected by the output)

Role Definition

A customer is any individual or group that:

- Receives the output of a process, or
- Is directly affected by the quality, timeliness, or reliability of that output

A project may have multiple customers, but they should be clearly identified and categorized.

Customer Types
1. External Customers
External customers are outside the organization and directly receive services or products.
Examples:

- Patients
- Families or caregivers
- Clients
- Community members
- Referring providers

2. Internal Customers
Internal customers are within the organization and depend on the process output to perform their work.
Examples:

- Downstream departments
- Clinical or operational staff
- Support functions
- Leadership teams

RETURN ON INVESTMENT

Purpose

The Return on Investment (ROI) and Return on Mission (ROM) section defines how the value of the project will be assessed upon completion.
Because improvement projects often require analysis and testing before impacts are known, ROI and ROM are typically calculated at the end of the project, not at charter approval.

This section establishes:

- The types of value expected
- The categories of impact to be evaluated
- Accountability for value realization

Core Question

What value has this project created?

Financial Impact Categories

- Soft Savings: Improve capacity and prevent future spending
- Hard Savings: Reduce current operating costs and/or increase revenue

Role Definition

The ROI represents the financial impact of the project once improvements are implemented and validated.

ROI may include:

- Cost reduction or avoidance
- Productivity gains
- Revenue enhancement
- Capacity creation with financial value

ROI Measurement Guidance
At chartering:

- ROI is typically not yet quantified
- Financial impact categories should be identified
- Measurement approach should be stated

Examples of financial impact areas:

- Labor efficiency
- Reduced overtime
- Supply utilization
- Avoided capital spend
- Increased throughput or access

RETURN ON MISSION

Purpose

Return on Mission (ROM) represents the non-financial value created by the project that supports the organization's mission, values, and strategic objectives.
ROM is especially important in:

- Healthcare
- Education

Non-profit and mission-driven organizations

Core Question

What value has this project created?

Financial Impact Categories

ROM may include improvements in:

- Patient or customer experience
- Quality and safety
- Access to services
- Staff engagement and workload balance
- Reliability and consistency of care or service

Role Definition

ROM may be assessed using:

- Performance metrics aligned to strategic goals
- Quality or safety indicators
- Experience or satisfaction measures
- Access or timeliness metrics

ROM Charter Statement:
Mission-related impact will be evaluated at project closure using measures aligned to organizational quality, safety, experience, and access goals.

19 Project Charter Quality Checklist

Opportunity / Problem Statement
- ☐ Clearly describes the current state problem
- ☐ Focuses on process/system, not people
- ☐ Includes where, when, and how often the issue occurs
- ☐ Supported by observable evidence or data references
- ☐ Free of solutions, impact, or justification

Business Case
- ☐ Explains why the problem should be solved
- ☐ Links to strategic, operational, or mission priorities
- ☐ Describes organizational impact (operational, financial, risk)
- ☐ Avoids speculative claims or guaranteed outcomes
- ☐ No solutions or implementation details included

Goals / Objectives
- ☐ Goals are data-based and measurable
- ☐ Baseline performance is stated
- ☐ Target performance is stated
- ☐ Goals are SMART
- ☐ Timeframe is defined (can be captured in the Timeline section)
- ☐ Primary objective identified
- ☐ Secondary objectives (if any) are relevant and limited

Scope
- ☐ Process start and end points defined
- ☐ Included departments/functions listed
- ☐ Relevant roles identified
- ☐ Systems/resources in scope stated
- ☐ Scope aligns with goals and timeline

Timeline
- ☐ Project kickoff date identified
- ☐ Project closure date identified
- ☐ Duration realistic for scope
- ☐ No task-level scheduling included

Leadership & Team
- ☐ Project Champion identified
- ☐ Project Leader identified
- ☐ Project Mentor identified and certified
- ☐ Team members represent key process touchpoints
- ☐ Customers (internal/external) identified

ROI (Return on Investment) / ROM (Return on Mission)
- ☐ ROI and/or ROM defined
- ☐ Value to be assessed and documented at project closure
- ☐ No speculative savings or benefits included

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Post-Project Charter Objectives

AFTER VALIDATING THE PROBLEM AND BUILDING THE PROJECT CHARTER IN THE DEFINE PHASE

THE ORGANIZATION TRANSITION WILL TRANSITION INTO THE REMAINING DMAIC PHASES

TO DRIVE SUSTAINABLE HEALTHCARE PROCESS IMPROVEMENTS

Measure Phase

Objectives:

- Build a current state process map
- Validate current state performance
- Establish accurate baseline data
- Identify process variation and operational gaps
- Confirm measurable opportunities for improvement

Analyze Phase

Objectives:

- Brainstorm issues as a multidisciplinary team
- Investigate workflow inefficiencies and delays
- Identify root causes contributing to defects
- Utilize fishbone diagrams, Pareto analysis, and data trends
- Prioritize the most impactful causes

Improve Phase

Objectives:

- Implement long-term sustainable solutions
- Eliminate root causes and non-value-added work
- Design a stronger future-state process
- Engage frontline healthcare staff in solution testing
- Improve patient safety, quality, and operational performance

Control Phase

Objectives:

- Monitor post-change performance data
- Ensure the process remains in control
- Build dashboards, KPIs, and monitoring plans
- Report results and trends to leadership
- Standardize successful process improvements

Healthcare DMAIC Outcomes

- Improved patient outcomes and safety
- Reduced waste and process delays
- Increased staff engagement and accountability
- Better operational performance and quality metrics
- Sustainable continuous improvement culture

Questions?

THANK YOU FOR ATTENDING TODAY'S PRESENTATION!

WE HOPE THIS INFORMATION ENCOURAGES YOU TO WANT TO LEARN MORE AND MAKE POSITIVE CHANGES FOR YOUR ORGANIZATION!

IF YOU HAVE ADDITIONAL QUESTIONS, PLEASE REACH OUT TO DR.KYDD AND/OR TANYA STINSON VIA EMAIL OR LINKEDIN!

Evaluation and Claim CE’s