**Guidelines for Process Improvement Projects**

The Office of Strategy and Measurement (OSM) will guide teams through process improvement initiatives and facilitate implementation when needed. However, the process improvement (PI) team is responsible for participating in process improvement steps, providing data, and implementing the team's solution(s). An OSM staff member will serve as a team facilitator who can assist with team member selection, team charter development, problem identification, stating project objectives and purpose, creating a realistic schedule for the team to accomplish its goals, meeting management, and training team members in process improvement methods and tools.

Composition of Process Improvement Teams: Process improvement teams should be comprised of 5 to 7 participants who are involved in the process being studied. Teams should be composed of individuals who bring authority, knowledge, skills, abilities, and personal attributes to the project. The process improvement team should have a team leader who is appointed by the project sponsor or selected by the team members. Each process improvement team should have a sponsor, who is the owner of the process or system being studied. All teams going starting a process improvement initiative can expect to do the following:

1. Team Charter – The PI team must develop a team charter that documents the why, who, and when of the project, including the problem statement, project objective or purpose, scope, deliverables, sponsor and stakeholder groups, team members, project schedule, and resources required.
2. Problem Identification – The PI team must agree upon the problem to be solved with guidance from the team sponsor and facilitator.
3. Project Objective or Purpose – The PI team must define the project objective or purpose along with the scope, or boundaries, of the project.
4. Documentation of Current Process Flow – The PI team must document the current process flow through the use of a flowchart(s) or process maps.
5. Root Cause Analysis – The PI team must determine the root cause(s) of the problem in order to find a lasting solution.
6. Other data collection and tools – Depending on the need PI team members will identify and supply data sets or begin tracking necessary data using process improvement tools.
7. Identification of solution(s) –PI team members will identify solutions and make recommendations.
8. Approval of recommendations – the PI team leader will be responsible for presenting the team's recommendations to the project sponsor and gaining any needed approvals for recommendations.
9. Implementation of solutions – Upon approval, the PI team is responsible for implementation of the recommended solution(s).
10. Documentation of team meetings – The PI team is responsible for documenting the proceedings of the team meetings and communicating them to stakeholders.