



Work Simplification/Process Improvement Project Definition Agreement

DATE	PERSON REQUESTING PROJECT (NAME AND TITLE)	
PROJECT TYPE	☐ DOCUMENTATION	☐ RENEWAL
	☐ IMPROVEMENT	☐ STANDARDIZATION
☐ DEVELOPMENT		☐ MAINTENANCE
PROJECT OBJECTIVES (PURPOSE OF THE PROJECT – SEE SUGGESTED OBJECTIVES IN FORM INSTRUCTIONS)		
PROJECT SCOPE (BOUNDARIES) (NAME THE PROCESS TO BE CHARTED AND THE START AND END POINTS OF THE CHARTING)		
PROCESS NAME	START POINT (OF FIRST ITEM CHARTED)	END POINT (OF LAST ITEM CHARTED)
PRIMARY DEPARTMENT INVOLVED (REQUESTING DEPARTMENT)	TEAM MEMBER(S) (L = LEADER) PHONE NUMBER(S)	
OTHER DEPARTMENTS INVOLVED	TEAM MEMBER(S) (L = LEADER) PHONE NUMBERS	
WORK SIMPLIFICATION PERSONNEL ASSIGNED TO PROJECT		PHONE NUMBER
START DATE	EST. COMPLETION DATE	ESTIMATED WORK SIMPLIFICATION HOURS, ORGANIZE FACTS
NUMBER OF OPERATING PEOPLE ON TEAM		ESTIMATED NUMBER OF HOURS OF OPERATING PEOPLE
REQUESTING DEPARTMENT MANAGER	WORK SIMPLIFICATION MANAGEMENT	WORK SIMPLIFICATION COORDINATOR
SIGNATURE _____	SIGNATURE _____	SIGNATURE _____
DATE _____	DATE _____	DATE _____

How to Complete a Work Simplification/Process Improvement PROJECT DEFINITION AGREEMENT FORM

Date	The date the form is completed.
Person Requesting Project	The name and the title of the person requesting the project
Project Type	Check the Project type agreed upon.
Project Objectives	For Documentation Projects a suggested objective is – <i>“To prepare charts and assure that they are accurate.</i> For Improvement Projects a suggested objective is – <i>“To prepare charts and assure that they are accurate, to improve those features of the process that can be changed without major development effort and to identify further improvement opportunities.</i> For Renewal Projects a standard general objective is <i>“to improve the effectiveness and efficiency by eliminating unnecessary work, and by rearranging and streamlining tasks”.</i> Specific objectives deal with cycle time, error rate, reporting effectiveness, security, etc. For Standardization Projects a suggested objective is <i>“to chart two or more ways that a process is currently being done and develop a process that is an improvement on all of those charted.</i> For Development Projects a suggested objective is – <i>“To chart, develop and obtain approval for (enter a description of the process to be developed here).</i> For Maintenance Projects a suggested objective is – <i>“To review and reaffirm the approved charts of the following processes (process names entered here).</i>
Project Scope	Enter the name(s) of the process(es) being studied, the point in each process where the study will begin and the point where it will end. (Sample of a scope description. PROCESS NAME, - New Policies, START POINT- Receipt of Application, END POINT - Issuance of Policy.)
Primary Department & Team Member(s)	Enter the name of the department that requested the project and the name(s) and phone number(s) of the person(s) from that department assigned to work on the project team. The person chosen to be the team leader will usually be from this department. Enter a capital “L” before the name of that person.
Other Departments and Team Member(s)	Enter the names of other departments involved in the project and the names and phone numbers of the person or persons from those departments assigned to work on the project team. If the person chosen to be the team leader is from one of these departments enter a capital “L” before the name of that person.
Work Simplification Personnel	The WS/PI facilitator enters his or her name and phone number and the name(s) of any other WS/PI people assigned to the project. For maintenance projects enter the name of WS/PI person who maintains the Process Chart Library.
Start Date	Enter a start date agreed upon with the requesting manager and the management of BAS.
Est. Completion Date	Enter an estimated completion date (for the chart preparation) agreed upon with the requesting manager and the management of BAS.
Estimate of WS/PI hours	To estimate the number of WS/PI hours required see the guidelines under Gathering Data.
Number of Operating People	Enter the number of people who will be team members assigned to this project.
Estimate of Operating Hours	To estimate the number of hours of operating people see the guidelines under Gathering Data.
Signatures	These signatures indicate agreement to proceed with the review on maintenance projects and on other projects to proceed with chart preparation, analysis, process development, testing and approval. With Improvement Projects (because they do not require approval) these signatures also cover agreement to implement.