

TCS Project Planning Worksheet

This worksheet is intended to support your project planning and implementation efforts. You may adapt this as works best for you by adding, removing, or changing the worksheet. Regardless of your desired approach, we recommend documenting your baseline assessment(s) and project planning so it can be referenced back to as needed.

Team Building	
Which team members will be responsible for day-to-day project function?	
Executive Sponsor: who in leadership can lend strong organizational support to this project?	
Other Champion(s): who may be a strong communicator and build enthusiasm for this project among the project team and organization?	
Which team members need to provide high level input or provide required approval?	
Which team members may be required for some components of the project (ie from different departments that may sometimes engage with TCS, like data or maternity care)?	
Next Steps:	
Other Stakeholder Engagement	
What other stakeholders may need to be engaged for this project to be successful (internal and external)?	
What is the role of member and community stakeholders in this project?	
What stakeholders are needed, but not yet engaged?	
What additional stakeholder buy-in work is required? (ie engaging potential contracting providers, enhancing relationships with CBOs for referrals)	
How will project updates be communicated within organization and with other stakeholders?	
Next Steps:	

Bandwidth and Resources	
What personnel is available to you for this project?	
What resources are available to you for this project?	
What gaps have you identified in bandwidth/resource available and project needs?	
What are possible solutions to address the identified gaps?	
Next Steps:	
Project Infrastructure	
Standing project meetings: frequency, date/time	
How will the team communicate?	
How will the team share project materials?	
Population Assessment: Who is being served?	
What is the volume of birthing members served per year?	
What is the demographic breakdown (race/ethnicity, language, other as appropriate)?	
Are there different care needs in the different communities served?	
What is the number of birthing members successfully supported by the previous version of TCS?	
What clinical outcomes or other metrics are of interest to you based on the geography or demographics of the population served? (Can use internal data or other sources like CDPH Maternal Health Dashboards by county)	
What gaps can you identify in understanding the population served by this policy?	
Next Steps:	

Create a Project Plan:

- Based on assessment of current TCS processes, where all pregnant and postpartum members are high risk, what is your MCP already doing well?
- What does your MCP already know how to do well?
- Are there items that may be planned and implemented in tandem?
- What is the “low-hanging fruit” that may be most easily updated?
- What are the most difficult to update policy topics? What are some strategies to reduce barriers in updating on these topics?
- Has there been consideration given to target a specific sub-population(s) in the pilot and spread to others in the summer?
- Based on your assessment of current TCS processes, general project fundamentals, and the population served, what might be the order of implementation of policy topics that makes the most sense for your organization?
 - Think about your roadmap: what might you consider implementing when?
- How will you know that the updated policy approach is successful? (Consider metrics)

Other tips for project planning:

- For timeline development, consider putting together a [Gantt Chart](#)
- For further baseline assessment, consider development of a Key [Driver Diagram](#), Process Mapping, and using a [Fishbone Diagram](#).
- For clarity within the project team, consider developing a [Project Charter](#).
- Set your [SMART Aims](#). You may have multiple aims because there are multiple implementation targets in this project. It may be most useful to have multiple narrow/specific aims than less broad (but more difficult to accomplish) aims.