Preparing a Project Plan Narrative: Suggested Guidelines

INTRODUCTION.

For organizations considering entering into a partnership between a hospital and a physician practice (or group of physicians) for healthcare information technology initiatives, ensuring a good understanding of all the issues related to HIT in both the hospital organization and the physician/group practice setting is critical. By doing so, representatives from both organizations will not only have an opportunity to contribute to the success of the partnership but also demonstrate compliance as required by the Stark and Anti-Kickback regulations.

In addition to preparing a SWOT Analysis and a Business Plan, a third way to ensure a solid understanding of accomplishing a specific objective is to prepare a Project Plan Narrative. This document builds upon the components of both the SWOT Analysis and the Business Plan by incorporating aspects of both documents. The Project Plan Narrative serves as the document that will explain not only what is to be accomplished but how it will be accomplished.

Whereas a business plan will provide the structure needed to create a roadmap for getting from a current state to a future state by describing the current situation, the Project Plan Narrative represents the navigational tools for doing so.

A SUGGESTED OUTLINE: PROJECT PLAN NARRATIVE.

The following outline may be used when developing a project plan narrative for accomplishing a particular objective such as entering into a healthcare information technology partnership. Please note that the term "narrative" is used since this document will serve as the source of input to create the actual project work breakdown structure for accomplishing specific tasks, assigning resources, defining start and end dates, and other data elements.

Project Charter. The Project Charter contains information that explains the project in a concise, specific manner. Components included in the project charter are the project justification; project sponsor; project manager; executive sponsor; summary level budget information; product description; a high level overview of the strategic plan; historical information; participating organizations; objectives; business model approach; assumptions; and barriers to acceptance.

Preliminary Project Scope Statement. Components of this section includes identifying the various sub-projects required to accomplish the objective. Sub-projects may be identified by functional areas, i.e., hardware, software, implementation, training, production, and post-production support. Or, sub-projects may take the form of various types of leadership needed to accomplish the objectives in the form of committees: executive, clinical, technical, privacy and security, and sustainability. Further, this section identifies the specific project deliverables, i.e., expectations of things to be accomplished, for each of the sub-projects identified. Examples

include the purpose of the sub-project, an overview of the current environment, an overview of the future environment, action items, constraints, assumptions, or areas of concern.

Additional topics addressed in the summary of preliminary project scope statement-related deliverables include identifying project success criteria; a high level identification of roles and responsibilities, including a description; a high level work breakdown structure that identifies tasks, subtasks, and projected start and finish dates.

Statement of Work. This section includes details over and above those identified in the preliminary project scope statement discussed above. Examples include a scope of work, location of the work, the period of work performance, a deliverables schedule, acceptance criteria, and any special requirements.

Project Quality Management. This section includes identifying ways to ensure that quality is built into the process of the objective to be accomplished. Items such as quality planning that includes assuring quality and controlling the quality of tasks to be accomplished.

Project Communications Management. Critical to the success to achieving objectives is the ability to effectively and efficiently communication the progress of the project. This area includes not only determining what information is to be communicated, but how, to whom, and assurances that the information is received as intended.

Project Risk Management. This area allows the project manager to concentrate on all aspects of risk: planning for risk, identifying risk, responding to risk, and monitoring and controlling risk. Items to consider include the "what if" something does or does not happen.

CONCLUSION.

In conclusion, the information provided in this document is intended to facilitate discussion, help identify areas of focus, and most importantly, serve as a tool to help HIMSS members and their stakeholders identify ways to facilitate success in healthcare information technology initiatives.

For further information, please contact:

JoAnn W. Klinedinst, CPHIMS, FHIMSS, PMP
Director, Healthcare Information Systems
HIMSS
jklinedinst@himss.org