

Maternal Population Profile and Doula Partnership Planning Worksheet

Building a referral network that reflects your patients' needs

Organization: _____ Completed by: _____ Date: _____

PURPOSE: Use this worksheet to develop a practical profile of the pregnant and postpartum population your practice serves, identify priority support needs, and translate those needs into the characteristics of a representative doula referral network.

How to Use This Worksheet

1. Complete the worksheet with a small interdisciplinary team, such as a clinician, care manager or referral coordinator, behavioral health team member, practice administrator, and other staff familiar with the maternal population.
2. Use available practice data when feasible, including registration, language, screening, referral, utilization, and patient experience information. Supplement the data with staff experience when information is unavailable.
3. Select all characteristics that are common in your population. For support needs, identify and rank the top three to five priorities.
4. Use the completed profile to identify gaps in the current doula referral network and the characteristics needed in potential partners.
5. Bring the completed or partially completed worksheet to the October in-person session to support focused partnership discussions and action planning.

IMPORTANT: This is a planning tool, not a comprehensive clinical assessment. Do not include patient names or other personally identifiable information. Use aggregate information and team knowledge.

Step 1: Who Are We Serving?

Check the characteristics commonly represented among your pregnant and postpartum patients. Add local categories where needed.

Languages

- ☐ English
- ☐ Spanish
- ☐ Amharic
- ☐ Arabic
- ☐ French
- ☐ Mandarin Chinese
- ☐ Other: _____

Common Access and Social Challenges

- ☐ Transportation barriers
- ☐ Housing instability
- ☐ Food insecurity
- ☐ Limited internet or technology access
- ☐ Limited social support
- ☐ Other: _____

Population Characteristics

- ☐ Adolescents or young parents
- ☐ Black/African American families
- ☐ Hispanic/Latino families
- ☐ Immigrant or refugee populations
- ☐ LGBTQIA+ individuals
- ☐ Individuals with disabilities
- ☐ Other: _____

Common Clinical and Behavioral Health Support Considerations

- ☐ Perinatal mood or anxiety concerns
- ☐ Substance use or recovery support needs
- ☐ History of high-risk pregnancy or pregnancy complications
- ☐ Prior traumatic birth experience
- ☐ NICU experience or anticipated NICU support needs
- ☐ Other: _____

Practice-defined geographic service area: Examples may include DC wards, neighborhoods, ZIP Codes, or other areas relevant to the practice.

Step 2: What Types of Support Are Most Needed?

Select the top three to five needs and rank your selections, with “1” representing the highest priority.

Select	Support Need	Priority
☐	Childbirth preparation	_____
☐	Birth planning and support for patient self-advocacy	_____
☐	Lactation or breastfeeding support	_____
☐	Postpartum recovery support	_____
☐	Perinatal mental health support	_____
☐	Appointment attendance and follow-up	_____
☐	Supporting communication between provider and patient	_____
☐	Health-related social needs navigation	_____
☐	Support for high-risk pregnancies	_____
☐	Support for substance use recovery	_____
☐	NICU or postpartum transition support	_____
☐	Emotional and physical support during labor	_____
☐	Newborn care support	_____
☐	Other: _____	_____

What informed these priorities? Check all that applies.

- ☐ Practice data
- ☐ Screening results
- ☐ Referral data
- ☐ Patient feedback
- ☐ Staff experience
- ☐ Other: _____

Step 3: What Characteristics Do We Need in Preferred Doula Partners?

Use the population profile and priority needs above to identify the characteristics needed across your referral network. The goal is a diverse network, not one “ideal” doula.

Access and Availability

- ☐ Serves our practice-defined geographic area
- ☐ Available for home visits
- ☐ Provides evening or weekend availability
- ☐ Offers virtual support options
- ☐ Has availability within our typical referral timeframe
- ☐ Other: _____

Specialized Experience

- ☐ Adolescents or young parents
- ☐ High-risk pregnancies
- ☐ Substance use recovery
- ☐ Perinatal mental health
- ☐ NICU
- ☐ Postpartum support
- ☐ Childbirth loss support
- ☐ Trauma-informed support
- ☐ Other: _____

Cultural and Linguistic Alignment

- ☐ Speaks patients’ primary language(s)
- ☐ Provides culturally responsive support
- ☐ Has experience with communities we serve
- ☐ Supports patient preferences and meaningful choice
- ☐ Other: _____

Collaboration and Operations

- ☐ Responds in a timely manner
- ☐ Willing to coordinate with providers with patient consent
- ☐ Familiar with Medicaid or managed care plan processes
- ☐ Participates in appropriate care coordination activities
- ☐ Uses agreed communication and issue-resolution pathways
- ☐ Clear understanding of role and scope of work
- ☐ Familiar with clinical workflows and protocols
- ☐ Maintains appropriate up-to-date certifications and liability insurance
- ☐ HIPAA compliant documentation
- ☐ Other: _____

Step 4: Compare Population Needs with the Current Referral Network

Identify where the current network is strong and where additional partnerships may be needed.

Priority Population need	Currently Represented	Gap or Uncertainty	Doula Partner Characteristic Needed
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	
	☐ Yes ☐ No	☐ Gap ☐ Unsure	

Step 5: Reflection

What is one unmet need in our maternal population that stronger doula partnerships could help address?

Which population or support need is least well represented in our current referral network?

What additional information do we need before identifying or expanding preferred referral partners?

Next Steps

SELECT ONE 30-DAY ACTION: Choose a practical action based on the most important gap identified above. Examples include validating referral information, meeting a potential doula partner, clarifying a patient-matching need, or identifying an internal referral owner.

Action: _____

Responsible person/team: _____

Partner(s) needed: _____

Target date: _____

Evidence of completion: _____

PREPARE FOR OCTOBER: Bring the completed or partially completed worksheet and the Provider-Doula Partnership Readiness and Maturity Checklist to the October in-person session. Be prepared to describe one priority population need, one desired doula partner characteristic, and one realistic next step.

Related Clinical Resource

- **American College of Obstetricians and Gynecologists. Partnering With Doulas in Clinical Settings. Committee Statement No. 31. August 2026.** <https://www.acog.org/clinical/clinical-guidance/committee-statement/articles/2026/08/partnering-with-doulas-in-clinical-settings>