

## IRLM – Implementation Strategies Worksheet

Smith, Rafferty, & Li, 2020

In implementation research, the word “intervention” can refer to two things:

- An evidence-based intervention → the program, policy, practice, pill, etc., that affects patient outcomes.
- An implementation intervention → manipulations to the *system* that help implement the EBI.

To avoid inevitable confusion, we typically refer to the latter as “strategies.”

When implementing an EBI, multiple discrete strategies are typically used. Several taxonomies/lists of strategies exist in the literature, including by Bunger et al. (2017) and by Powell et al. (2015).

1. From either taxonomy below, place a checkmark (✓) next to strategy categories that you may be considering for your project.
  - a. For help selecting strategies based on your determinants of implementation, you may use the CFIR-ERIC Matching Tool found at <https://cfirguide.org/choosing-strategies/>.
2. For each strategy category, identify discrete strategies and operationalize them for your project.
  - a. A full list of Bunger et al. strategies can be found at <https://link.springer.com/article/10.1186/s12961-017-0175-y>.
  - b. A full list of the Powell et al. (a.k.a. ERIC) strategies can be found at <https://implementationscience.biomedcentral.com/articles/10.1186/s13012-015-0295-0/tables/1>.
3. Add your discrete strategies to your **IRLM**.

✓	Strategy category	Example discrete strategies
	<b>Bunger et al., 2017</b>	
	Planning	<ul style="list-style-type: none"> <li>- Tailor strategies</li> <li>- Identify and prep champions</li> <li>- Develop blueprint</li> <li>- Build buy-in</li> <li>- Assess readiness, identify barriers</li> </ul>
	Education	<ul style="list-style-type: none"> <li>- Informal local opinion leaders</li> <li>- Conduct educational meetings</li> <li>- Distribute materials</li> <li>- Conduct ongoing training</li> </ul>
	Finance	<ul style="list-style-type: none"> <li>- Fund/contract</li> <li>- Access new funding</li> </ul>
	Restructure	<ul style="list-style-type: none"> <li>- Change records systems</li> <li>- Change structure/equipment</li> <li>- Revise roles</li> </ul>
	Quality management	<ul style="list-style-type: none"> <li>- Develop systems</li> <li>- Use data experts</li> <li>- Clinical supervision</li> <li>- Reminders</li> <li>- Obtain worker feedback</li> </ul>
	Policy	<ul style="list-style-type: none"> <li>- Change policy context</li> </ul>

<b>Expert Recommendations for Implementing Change (ERIC; Powell et al., 2015)</b>	
Use evaluative and iterative strategies	<ul style="list-style-type: none"> <li>- Assess for readiness and identify barriers and facilitators</li> <li>- Audit and provide feedback</li> <li>- Develop and implement tools for quality monitoring</li> <li>- Conduct local need assessment</li> <li>- Obtain and use patients/consumers and family feedback</li> </ul>
Provide interactive assistance	<ul style="list-style-type: none"> <li>- Facilitation</li> <li>- Provide local technical assistance</li> <li>- Provide clinical supervision</li> <li>- Centralize technical assistance</li> </ul>
Adapt and tailor to context	<ul style="list-style-type: none"> <li>- Tailor strategies</li> <li>- Promote adaptability</li> <li>- Use data experts</li> <li>- Use data warehousing techniques</li> </ul>
Develop stakeholder interrelationships	<ul style="list-style-type: none"> <li>- Identify and prepare champions</li> <li>- Organize clinician implementation team meetings</li> <li>- Recruit, designate, and train for leadership</li> <li>- Inform local opinion leaders</li> <li>- Build a coalition</li> <li>- Obtain formal commitments</li> </ul>
Train and educate stakeholders	<ul style="list-style-type: none"> <li>- Conduct ongoing training</li> <li>- Provide ongoing consultation</li> <li>- Develop educational materials</li> <li>- Distribute educational materials</li> <li>- Use train-the-trainer strategies</li> <li>- Create a learning collaborative</li> </ul>
Support clinicians	<ul style="list-style-type: none"> <li>- Facilitate relay of clinical data to providers</li> <li>- Remind clinicians</li> <li>- Develop resource sharing agreements</li> <li>- Revise professional roles</li> <li>- Create new clinical teams</li> </ul>
Engage consumers	<ul style="list-style-type: none"> <li>- Involve patients/consumers and family members</li> <li>- Intervene with patients/consumers to enhance uptake and adherence</li> <li>- Prepare patients/consumers to be active participants</li> <li>- Increase demand</li> <li>- Use mass media</li> </ul>
Utilize financial strategies	<ul style="list-style-type: none"> <li>- Fund and contract for the clinical innovation</li> <li>- Access new funding</li> <li>- Alter incentive/allowance structures</li> <li>- Make billing easier</li> <li>- Alter patient/consumer fees</li> </ul>
Change infrastructure	<ul style="list-style-type: none"> <li>- Mandate change</li> <li>- Change record systems</li> <li>- Change physical structure and equipment</li> <li>- Change service sites</li> </ul>