Implementation in Clinical Settings: A Planning Guide for Investigators

***Worksheet 4*** - Creating an Action Plan

Use this worksheet to describe how each implementation strategy will be used in your project. Create a table and answer these questions for ***each*** of your selected implementation strategies.

**EXAMPLE 1**

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| **Strategy #1** | | *Example 1* |
| **Dimension** | **Description** | **Strategy #1: *Conduct educational meetings***  Have a trainer meet with providers in their practice settings to educate them about the intervention with the intent of changing the provider’s practice. |
| **Who delivers** | Which individual or individuals will deliver the implementation strategy?   * Implementation strategies can have a single individual or multiple individuals involved (e.g. educational meetings could be provided by one individual within the clinical setting or a team from outside the clinical setting) | A research team member with clinical expertise about the intervention.   * For example, a clinician with expertise in diagnosis and treatment of alcohol use disorder and experience implementing the screening, brief intervention and referral to treatment (SBIRT) intervention in primary care settings. |
| **What/How** | What are the actions, steps or processes involved in the implementation? How will the implementation strategy be delivered and in what order? | * The clinical expert shares information about the intervention (e.g. its effectiveness, its core components and the eligible patient population). * The clinical expert also asks for feedback from the clinicians (e.g. “what are some potential advantages you see in implementing this program? What support would be helpful in preparing to implement this program?”) |
| **Target of the strategy** | Where or to whom is the strategy directed or what is it trying to impact? | * Provider and staff knowledge of the intervention (e.g. proportion of providers that report understanding key intervention components) * Provider willingness to use the intervention. |
| **Goal** | What is the goal or expected impact of the implementation strategy?   * Make sure the level of the goal (individuals, teams, practices, systems) is matched to the level of the implementation strategy. | Increase knowledge about the intervention by providers and staff and increase provider and clinical team use of the intervention. |
| **Timing** | When in the project will the implementation strategy be used? | The educational meetings will start in month 3 of the project implementation |
| **Frequency and Intensity** | How often and/or for how long will the implementation strategy be delivered? | * Each meeting will be conducted virtually (via video conference) and last 60 minutes. * The meetings will be held at a time when clinicians typically gather (e.g. during a monthly provider meeting). |

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Use this worksheet to describe how each implementation strategy will be used in your project. Create a table and answer these questions for ***each*** of your selected implementation strategies.

|  |  |  |
| --- | --- | --- |
| **Strategy #1** | |  |
| **Dimension** | **Description** | *Strategy NAME* |
| **Who delivers** | Which individual or individuals will deliver the implementation strategy?   * Implementation strategies can have a single individual or multiple individuals involved (e.g. educational meetings could be provided by one individual within the clinical setting or a team from outside the clinical setting) |  |
| **What/How** | What are the actions, steps or processes involved in the implementation? How will the implementation strategy be delivered and in what order? |  |
| **Target of the strategy** | Where or to whom is the strategy directed or what is it trying to impact? |  |
| **Goal** | What is the goal or expected impact of the implementation strategy?  Make sure the level of the goal (individuals, teams, practices, systems) is matched to the level of the implementation strategy. |  |
| **Timing** | When in the project will the implementation strategy be used? |  |
| **Frequency and Intensity** | How often and/or for how long will the implementation strategy be delivered? |  |