

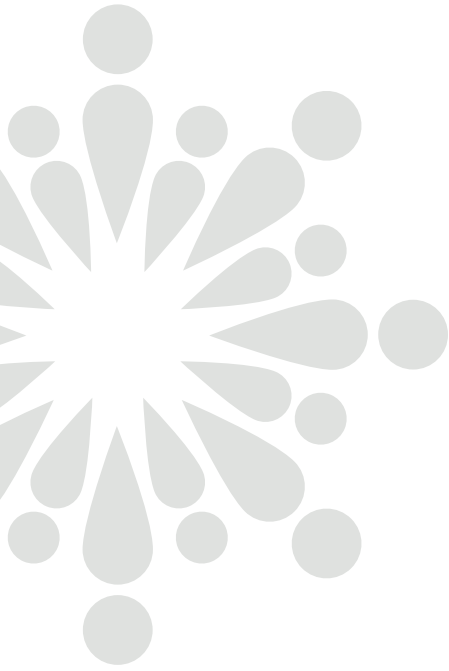


October 2024

Moving ideas to action: An implementation toolkit



Knowledge Institute
on Child and Youth Mental Health and Addictions



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About this toolkit

What is the purpose of this toolkit?

Change can be complex, and knowing where to start can sometimes be hard. We developed this toolkit to help you use implementation practices to manage your change initiatives.

The Knowledge Institute on Child and Youth Mental Health and Addictions (Knowledge Institute) has helped implement evidence-based programs, policies, and interventions to improve the lives of children and young people. In this toolkit, we've drawn on our own experiences, considered the latest implementation science research, and shared what we've heard on how implementation is practiced across the child and youth mental health and substance use sector (the sector).

This resource is an updated version of our implementation toolkit published in 2013. It features current evidence on implementation science and provides steps and resources for planning, doing, and sustaining your implementation projects. This toolkit will help you to:

- Get people and systems ready for change.
- Put your plan into action.
- Monitor and review your progress.

About this toolkit

Who is this toolkit for?

This toolkit is intended for anyone in the sector starting an implementation process. This might include mental health professionals, administrative support staff, program managers, and leaders responsible for implementing a mental health initiative or project within or across their organization and community.

How to use this toolkit

To navigate this toolkit, you can use the table of contents to jump ahead to information on a specific activity and locate supporting tools and resources. You can then follow the links for more in-depth information.

We recommend completing all activities outlined within each section of the “Plan, Do, Sustain” model. However, some of the activities in each stage don’t necessarily follow the order in which they are written. Implementation practice sometimes looks different from what is set out on paper, so flexibility is encouraged.



Getting started

Using a common language

Throughout this toolkit, we use many related but distinct terms.



Implementation: Putting a plan or idea into action.



Implementation practice: Applying evidence from implementation science to different contexts and settings to improve outcomes (Metz, 2019).



Implementation process: Undertaking activities that follow stages in an implementation model.



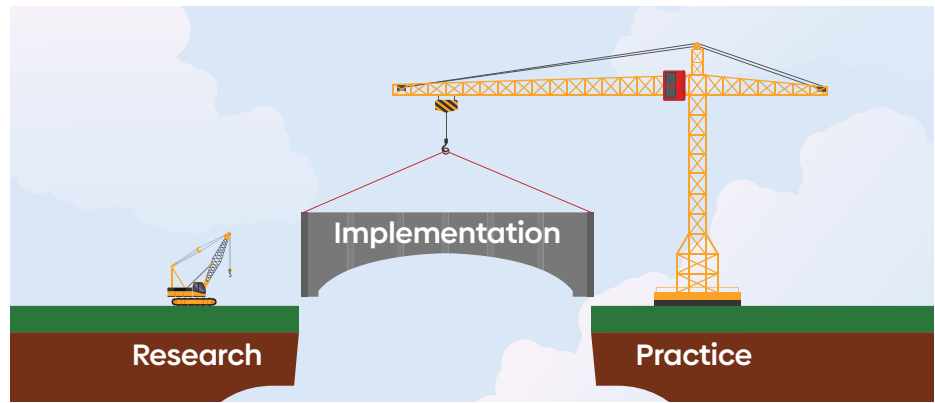
Implementation project: In this toolkit, we refer to what you are implementing as an “implementation project” or simply “project.” Other literature uses “innovation,” “initiative,” or “intervention” or specifies a “program” or “policy.” We use a broad term encompassing the variety of projects we see implemented across the sector.

What is implementation science?

Implementation science is the study of methods to help put research into practice. It connects research evidence with real-world use for better outcomes. In our sector, it can be used when creating new policies or innovations, putting evidence-based programs into practice, or turning ideas into action.

Getting started

Sobia Khan, the Director of Implementation at The Center for Implementation, has addressed the barriers and fears about adopting implementation science. She says people are concerned that their current skills in approaches like quality improvement or change management will become meaningless. However, she believes, “If you want to adopt implementation science approaches, you do not need to completely overhaul what you are currently doing” (Khan, 2023).



Why use implementation science?

Implementation science can help you bring your great idea to life by helping to create conditions that support your idea.

Implementation science intersects with other change strategies like change management, quality improvement, dissemination, knowledge mobilization, and engagement. These fields overlap and have informed the various models, theories, and frameworks within implementation science.

In fact, you may already be incorporating aspects of implementation science into your work!

Values for successful implementation

Implementation is as much an art as it is a science, needing both technical expertise and the ability to navigate human dynamics and organizational culture.

Your organization’s values will influence the success of your implementation project. These might include trust, collaboration, and clear communication between everyone involved. Even if it feels obvious, try reflecting on whether these values are present in your implementation process and make adjustments if they aren’t. Shared values promote shared ownership, a supportive learning culture, intentional processes and practices, and ongoing growth and development.



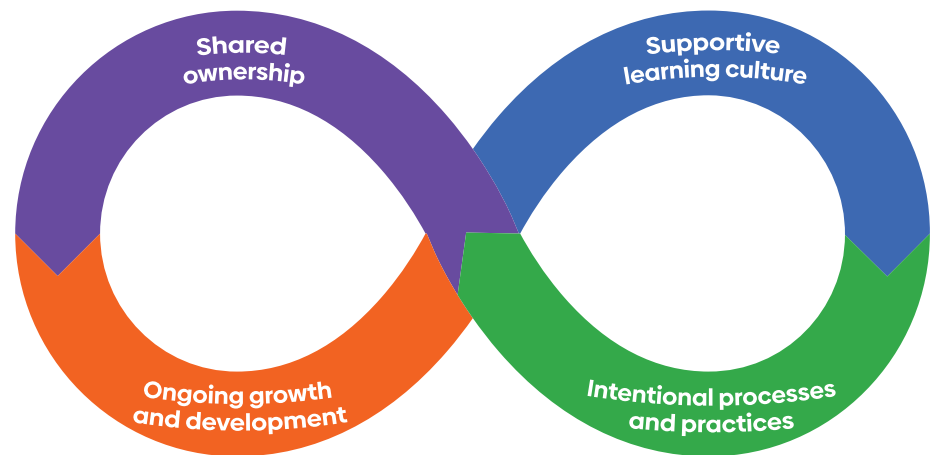
It’s important to approach implementation with empathy, lifelong learning, patience, and resilience while valuing evidence, processes, and transdisciplinary teamwork (Moore & Khan, 2020).

Getting started

Throughout this toolkit, we've incorporated values as practical considerations and brought forward an equity- and engagement-focused lens to implementation.

Learning organizations

Learning organizations can help manage change by modelling the values needed to implement new projects successfully and by committing to learning activities like evaluation and continuous improvement.



These four themes (shared ownership, supportive learning culture, ongoing growth and development, and intentional processes and practices) were identified by the Knowledge Institute and underpin our learning organization model.

Are you on your way to becoming a learning organization? We recommend forming a committee to carry out tasks and activities related to coordinating a learning organization's mandate.

These might include:

- Hosting all-staff meetings to share updates on internal projects.
- Promoting professional development opportunities.
- Collecting and using staff feedback.
- Encouraging quality improvement activities.

Know what you're implementing

Whether you're tasked with implementing an evidence-based practice, launching a new project, crafting a policy, or instigating a transformative change, your vision and objectives must be clear. To start, ask:

- Why is there a need for change?
- Who or what needs to change?
- What new things are you introducing? This could be WHAT you want people to adopt, use, or do differently (Brown et al., 2017). Here are some examples:
 - Programs.
 - Practices.
 - Policies.
 - Procedures.
 - Principles.
 - Products.

By framing the purpose of what you're implementing, you set the stage for starting your project.



Is your organization trying to decide whether to implement something new? Think about gathering evidence about the benefits of implementing to inform your decision. Here are some questions you can discuss.

- What is the issue you are trying to solve? Why is it significant?
- Are there existing resources and supports?
- Does your new idea fit with your organization's goals?
- What is the benefit of implementing this project?
- Is there evidence about why this could work in your context?

Implementation model: Plan, Do, Sustain

Implementation models describe the stages to introduce and sustain change (Nilsen, 2015). Models promote a common language that can enhance decision-making and communication (Moullin et al., 2020).

These models show that implementation is not a one-size-fits-all process but rather a journey that unfolds over time. Following a staged process can help you manage the complexity of change, allocate resources strategically, and systematically track progress.

Getting started

This model draws inspiration from active implementation frameworks developed by the National Implementation Research Network (Fixsen et al., 2005). These frameworks emphasize the importance of integrating new practices into a routine and using strategies and tools to achieve sustainable change.

Implementation models are used throughout the sector and can be adapted to local contexts (Albers et al., 2017). In Ontario, the sector has unique needs, resources, and challenges in different regions. Customizing a model to your local context helps align it with the specific needs and capacities of your communities, partners, and projects.

Here are the three key stages and activities of the implementation model used by the Knowledge Institute:

Stage 1. **Plan**

Stage 2. **Do**

Stage 3. **Sustain**



We encourage you to follow the order of the checkboxes within each stage before proceeding to the next. However, implementation is often non-linear and iterative. Some activities will run concurrently, or you may need to move back and forth between stages.



Stage 1. Plan

The planning stage involves preparing people and systems for change. As you progress with your project, you may need to revisit this stage and adapt your plan.

The planning stage includes most of the activities in our implementation model. A well-thought-out plan is essential to making your change happen as you envision it.

Stage 1. Plan

You've got this! Track your progress:

In this section	What you will do	Resources
<input checked="" type="checkbox"/> Develop buy-in	<ul style="list-style-type: none">• Build leadership support.• Create a shared language and understanding of concepts.• Identify and engage key partners.	<ul style="list-style-type: none">• One-pager.• Partnership mapping tool.• Quality standard for youth engagement.• Quality standard for family engagement.
<input checked="" type="checkbox"/> Create a team	<ul style="list-style-type: none">• Bring people together.• Establish roles and responsibilities.• Build capacity.• Facilitate communication.	<ul style="list-style-type: none">• RACI matrix.• Partnership agreement.• Learning needs assessment.
<input checked="" type="checkbox"/> Describe your implementation project	<ul style="list-style-type: none">• Develop a clear description.• Allocate resources.• Create a project charter.	<ul style="list-style-type: none">• Hexagon tool.• Practice profile.• Project charter.
<input checked="" type="checkbox"/> Assess your context	<ul style="list-style-type: none">• Assess readiness.• Identify barriers and facilitators.	<ul style="list-style-type: none">• Consolidated framework for implementation research.• Theoretical domains framework.• StrategEase tool.
<input checked="" type="checkbox"/> Draft a workplan	<ul style="list-style-type: none">• Plan your implementation strategies.• Create an implementation workplan.• Get feedback.	<ul style="list-style-type: none">• Logic model.• Program Sustainability Assessment Tool.• Implementation workplan.• Health Equity Impact Assessment.

Stage 1. Plan

The term “leadership” refers to decision-makers in and outside your organization. Decision-makers could be program managers, board of directors, executive management, supervisors, and others.

☑ Develop buy-in

Build leadership support

Leadership support is a driving force that steers and shapes implementation. Having people in decision-making positions on board with your project can help align organizational goals to support the implementation process. Involving leadership may include informing them through updates, engaging at regular points for approvals, or having a leadership member on your implementation team to offer guidance. Engaging your organization’s leaders in this way can help ensure they are actively supporting and endorsing your project.

How can you engage leadership and encourage their support?

- Identify examples where projects were successfully implemented within your organization and sector.
 - Ask: What worked well the last time something new was introduced?
- Review related commitment documents, like policies and procedures, that refer to or align with the implementation project. These might show where work is already being done or where gaps exist.
- Early in the process, engage leadership in discussions about goals, benefits, and challenges.
- Highlight how the project aligns with your organization’s vision and values.
- Prepare to address concerns and provide clear, data-driven evidence of the potential impact.
- Identify and request the resources needed to make the change happen (staff, equipment, honoraria for young people and family members).

Create a shared language and understanding of concepts

Everyone involved must have a shared understanding of what you are trying to achieve, including goals, principles, and key concepts. Establishing a shared language can improve communication, enhance collaboration, and empower people to contribute to the project meaningfully. Consider the following:

- Identify the purpose and goals of implementing your project.
- Review policies, procedures, and training related to your project. Clearly define any key concepts, terms, or principles if none exist.
- Create space to learn more about the project and related concepts through conversation, training, and resources.

Stage 1. Plan



Talk about the implementation process and what it entails. Our [informational one-pager](#) can help you explain the activities in our implementation model.

Identify and engage key partners

The change you're implementing can affect many people – including colleagues, external partners, the community, and the sector. Identifying who is impacted by your project will help ensure that the people contributing to the implementation process are engaged as partners. Key partners can include anyone impacted or motivated to participate because they have a level of influence or interest in the process or outcomes of the project. Key partners might be:

- Young people.
- Family members.
- Service providers.
- Child and youth mental health and addictions leaders and staff.
- Cross-sectoral representatives (education, youth justice, community services).
- Community members.

Here are a few considerations when engaging key partners:

- Be clear, direct, and transparent about why you are engaging your partners.
- Be aware of who is in your community and include them in your implementation project.
- Work with relevant partners to identify their level of involvement and co-develop engagement strategies. Use the partnership mapping tool to visually identify and categorize your partners based on their level of influence and interest in your project. re of who is in your community and include them in your project.



Engage young people and families. Ask: Does the project impact young people and families? Involving young people and family members in decision-making processes and projects that affect them can ensure that the changes you are introducing are meaningful and feasible (Nguyen et al., 2019). To learn more about meaningful engagement, check out the [quality standard for youth engagement](#) and [quality standard for family engagement](#).

Stage 1. Plan



The [partnership mapping tool](#) can help you tailor communication strategies and build stronger partnerships. The tool can:

- Help you identify key partners.
- Help partners decide how they want to be engaged.
- Prioritize your engagement efforts.

Create a team

Bring people together

Teamwork and collaboration are essential to the implementation process. An implementation team includes the people creating, leading, and doing the work. The team could be made up of direct service providers, clinicians, senior leadership, management, technical support, administrative support, young people, and families. The number of team members will depend on the scope of the project and the availability of resources.

Here are a few things to consider as you develop your implementation team:

- Convene individuals with the necessary skills, context expertise, decision-making authority, and commitment.
 - Ask: Have we engaged the right people to understand the audience, issue, and implementation setting? If there are gaps, who else can you engage?
- Ensure everyone has a shared understanding of the project's goals and timelines.
- Establish a regular meeting schedule and accommodate the team's availability and project timelines.
- Be flexible in your approach to increasing access and participation. Proactively identify and address factors affecting participation, such as location, accessibility, and compensation.

Establish roles and responsibilities

Establishing clear roles on your implementation team will improve commitment and help avoid confusion, duplication of efforts, and gaps in accountability. Together with your implementation team:

- Define the project's scope and objectives.
- Identify the skills, expertise, and experience needed throughout the implementation process.
- Match each member's role with their strengths and competencies.
- Decide who will facilitate meetings, bring specific subject matter expertise, represent specific groups, lead changes, or document progress.

Stage 1. Plan



A RACI matrix can help clarify roles for each task. RACI stands for Responsible (who is doing the work), Accountable (who will approve the work once complete), Consulted (who might give input on the work), and Informed (who needs to be updated but not formally consulted). Check out this [video about developing a RACI matrix](#) with your team.

- Facilitate regular check-ins to ensure that people understand identified roles and responsibilities.

Develop a partnership agreement to clearly outline what is expected from members of your implementation team. Share this document with your team and revisit it as needed to ensure project continuity (in case of staff turnover) and show your project's progress.

- You can also modify this agreement if you are working with external partners on implementing your project, even if they aren't on the implementation team.



This [partnership agreement template](#) can get you started. A partnership agreement could include the following components but can be adapted to your needs:

- Title.
- Project background and goals.
- Purpose of the partnership agreement.
- Roles of the implementation team.
- Deliverables.
- Meetings.
- Date of approval.

Stage 1. Plan

Build capacity

Your implementation team requires support and resources to actively participate in the implementation process. There are different types of capacity-building efforts and strategies to support people in making a change (Leeman et al., 2015). These techniques include enhancing your team's knowledge, skills, and capabilities. Building capacity may be done through learning about the subject matter, implementation science, project management training, or knowing how to access resources to update knowledge.

Identify champions

Champions can actively advocate for and drive the desired changes within your organization. They can motivate and inspire others by demonstrating ownership of the change, explaining the reasons and benefits behind the change, and helping overcome resistance (Bonawitz et al., 2020; Bunce et al., 2020; Miech et al., 2018).

- Work with your implementation team to identify their skills and knowledge needs. The needs of your team might vary between projects and individuals. Consider conducting a learning needs assessment and asking your team members what competencies they want to develop.



Learning needs assessments define a gap between current and desired practices for a specific audience (University of Toronto, 2020b). They examine:

- Current skill levels.
- The gap between current and desired skills.
- Ways to achieve your desired outcomes through learning and motivation.

- Set realistic timelines that allow new skills to be developed.
- Provide ongoing opportunities to enhance skill sets (attending conferences related to the project).
- Facilitate ongoing discussions about social determinants of health and equity. Encourage reflection about sensitivity, vulnerability, and cultural identity (Joseph et al., 2021).

Facilitate communication

Communication across your team and key partners should be regular and ongoing. Sharing information about project updates, milestones, and your plan can help keep people engaged, accountable, and motivated. This can also help identify problems quickly and open opportunities to receive feedback. Enhance your communication by trying a few of the following strategies:

Stage 1. Plan

- Emphasize the value of diverse perspectives and create opportunities for everyone to contribute their unique insights and experiences. Identify potential power dynamics, create space to ask questions, and empower critical feedback.
- Share meeting agendas in advance and be receptive to input on proposed agenda items.
- Proactively identify and address barriers to participation, like meeting times, location, accessibility, and childcare. Where barriers exist, consider providing options for written, verbal, or visual exchanges and accommodating team members with varying abilities.
- Establish feedback mechanisms, like providing opportunities for partners to offer input through surveys. Remember to close any feedback loops by acknowledging and acting on the feedback received.

☑ Describe your implementation project

Develop a clear description

Work with your implementation team to build on the project description you developed in the “Know what you’re implementing” step. Here, specify the project’s goals, objectives, scope, and core components. A clearly defined purpose will help you tailor your implementation process to ensure the outcomes are relevant and meaningful to all partners.



Use [the Hexagon tool](#) to evaluate the fit and feasibility of your project. You can revisit this tool throughout the implementation stages to show how your project aligns with the current work and context. This planning tool looks at your project through six factors:

- Needs: How well does the project you’re implementing meet identified needs?
- Fit: Overall fit with other organizational priorities, structures, and supports.
- Capacity: The ability to implement as intended and to sustain and improve implementation over time.
- Supports: For training, staffing technology supports, curricula, data systems and administration.
- Evidence: The outcomes that might be expected from the project.
- Usability: This includes determining if replications were made (the project has been successfully implemented in other places) and how well the project is operationalized.

Stage 1. Plan

Using core components to describe your project can demonstrate what drives the outcomes you hope to achieve. Core components are fundamental aspects of your project critical to its success (Blasé & Fixsen, 2013; Fixsen et al., 2009). The core components can be principles that describe contextual factors, structural elements, or intervention practices.

For example, core components for a specific program could be “the intervention occurs in schools or communities; with a low adult/child ratio; by practicing social skills” (Blasé & Fixsen, 2013). If you are implementing an evidence-based practice or program, you can check if researchers and program developers have dictated core components. Core components have been developed by testing the mechanisms by which the change is expected to occur and validating fidelity measures (Blasé & Fixsen, 2013).



Work with your implementation team to set up a practice profile describing what people will be saying and doing for the project to happen. Practice profiles can help identify key associated activities of your core components, improve the likelihood of consistent implementation, and ensure outcomes can be accurately interpreted (Metz, 2016). You can use these headings to build descriptions for each core component (National Implementation Research Network, n.d.) and refer to additional examples on the [Active Implementation Hub](#).

- **Expected implementation:** The ideal or standard way a practice should be implemented. Describe the best practices or steps to achieve the required results, using words like “all of the time” or “consistently.”
- **Developmental variation:** This allows flexibility to the expected implementation component while aligning with the core component. Developmental implementation could describe activities using words like “some of the time” or “somewhat inconsistently.”
- **Unacceptable variation:** Include any unacceptable activities that could result in an unwanted outcome. These may be anything opposite of what the “expected implementation” is.

Stage 1. Plan

Allocate resources

Implementation projects require resources and support to bring a change to life. Resources might include funding, time, and personnel. Collaborate with your leadership team to decide what can be dedicated to this work. If your resources are insufficient, you can help secure support by partnering with other organizations, capitalizing on community efforts, and dividing the responsibility for costs across partners.

Different types of costs might be associated with implementing your project, like:

- Dedicated staff time.
- Honoraria expenses for young people and families.
- Capacity building of partners (training costs and time).
- In-kind costs (equipment, software).
- Ongoing supervision and coaching.



Use these tips to build your plan for the required resources:

- Break down tasks, estimate timeframes, and calculate budget needs.
- Combine any in-kind costs with other related projects in your, or partner, organizations.
- Document and record your expenses. This can help you plan for sustainability later on.

Create a project charter

A project charter is both a planning tool and a communications tool that outlines expectations throughout the implementation process. It can be used to define your project's scope, partners, decision-making responsibilities, project authority, resource allocation and constraints, SMART (specific, measurable, achievable, relevant, and time bound) objectives, or potential challenges. It can also be a helpful reference document to orient new partners to your project.



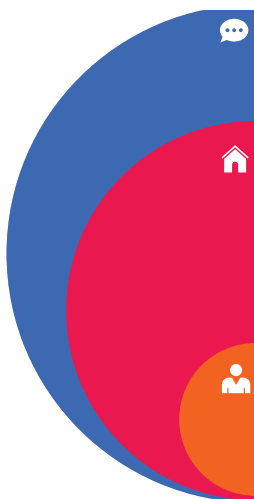
You can [adapt this template](#) to build your project charter.

☑ Assess your context

Assess readiness

Readiness for change is an essential consideration throughout the implementation process (Damschroder et al., 2009; Holt et al., 2010; Weiner, 2009; Weiner et al., 2020). It's important to take the time to assess the environment you are working within and ensure that individuals and organizations are well-prepared – and have the proper understanding, skills, time, and support to put the change into practice.

Readiness may look different depending on levels and contexts:



Systems level:

Do other organizations, processes, funding, technical assistance, and relationships impact your ability to move ahead with your implementation project?

Agency, community, and organizational level:

Does your organization have an improvement culture for change, with appropriate resources, clinical workflow processes, leadership, and capacity to adapt?

Competing projects or priorities may influence organizational enthusiasm to take on a new change. Becoming a learning organization is one way to show organizational commitment to try new things.

Individual level:

Do your key partners and audience (the people who will make a change) have the required motivation, resources, and skills?

Implementation drivers are facilitators that contribute to successful implementation. You can assess them to identify areas that may need attention or improvement. There are three categories of implementation drivers (Fixsen et al., 2015).

- Competency drivers: These help to develop, improve, and sustain an agency's ability to implement. They include staff selection, training, ongoing consultation, coaching, and performance assessment.
- Organizational drivers: These create and sustain favourable organizational and system environments for effective service. They include a data system for decision-making and program evaluation, administration supports, and systems interventions, like building partnerships.
- Leadership drivers: Successful implementation requires leaders' commitment, involvement, and accountability. Leaders drive the use of outcome data to inform decision-making and keep staff motivated.

Stage 1. Plan

Engage your partners to assess readiness or complete a readiness assessment. Confirm motivations or potential challenges with your identified partners from the audience or organization where you introduce your implementation project.

Identify barriers and facilitators

Considering barriers and facilitators early in the process can help you identify what will hinder or support the successful adoption of your project. Once you identify a barrier or facilitator, you can develop targeted strategies to address challenges.

- An implementation barrier could be limited knowledge or skills. For example, in a healthcare organization, implementing a new electronic health records system can be challenging if staff lack the skills to use the new technology, which would reduce its effectiveness.
- An example of an implementation facilitator is access to an individual with subject matter expertise. This individual could help mentor or train other staff to use the system. Training would ensure all staff are equipped with the necessary skills to use the new system in the way it's intended to be used (for inputting accurate client records in a timely manner).



We have included some [examples of implementation barriers](#). As you move through the implementation process, refer to these for ideas about overcoming or preventing them.

Start identifying factors that affect your project by gathering input from your key partners. Work with your key partners to identify what methods of collecting information work best for them, informal or formal.

- Informal methods include brainstorming with your team, chatting with staff at staff meetings, and reviewing conversations and notes from training.
- Formal methods include conducting a literature review, interviewing and surveying partners, and hosting focus groups.

Stage 1. Plan



Consider using an implementation science framework to identify, organize, and synthesize your findings. Many frameworks can help you find barriers and facilitators. Here are two we've found helpful that have also been used in the health or mental health care sectors (Albers et al., 2017; Whittenbury et al., 2022):

- Consolidated Framework for Implementation Research (CFIR) describes various factors affecting implementation across five domains. These domains include the innovation, outer setting, inner setting (of an organization), characteristics of individuals involved in implementation, and the implementation process. It has an [accompanying guide](#) for setting up an implementation study or evaluating implementation design (Damschroder et al., 2022).
- Theoretical Domains Framework (TDF) assesses what influences human behaviours. Its 14 domains – including knowledge, beliefs, skills, and social influences – can be used to develop strategies targeting individual behaviour changes (Atkins et al., 2017).
 - The [StrategEase Tool](#) can help you map barriers and facilitators to the TDF.

Draft a workplan

Plan your implementation strategies

Implementation strategies can enhance the adoption, implementation, and sustainability of your project (Powell et al., 2015). Think of your strategies as HOW you will achieve your outcomes. Work with your implementation team to decide which strategies to use to put your goals into action. You can use various tools to map and analyze your strategies (Powell et al., 2017). Most importantly, planning will identify ways that you will address the barriers and facilitators to implementing your project.

Here are some examples of strategies that might go into your workplan (Powell et al., 2015):

- Access new funding.
- Participate in collective spaces.
- Embed change management strategies.
- Capture and share local knowledge.
- Audit and provide feedback.
- Change physical equipment and structures.
- Conduct training and education.
- Develop incentives.

Stage 1. Plan

Design your implementation strategies to enhance reach with your key partners and equity-deserving communities (Brownson et al., 2021; Kerkhoff et al., 2022).

Avoid targeting barriers that can't be changed or don't contribute to your goals.

- Prepare champions.
- Create new meetings for teams or committees.
- Obtain formal commitments from partners.
- Use reminders.
- Distribute and disseminate guidelines.
- Use advisory boards.

Create an implementation workplan

An implementation workplan describes who will do what and when. The implementation team can use the workplan to track timelines and milestones and document project changes throughout the implementation process. This differs from a project charter because it breaks down the specific tasks you will do to achieve your goals.

Within your implementation workplan, consider whether you will develop evaluation, communication, sustainability, and risk management plans.

- Evaluation: Establish the criteria and methods for measuring your progress. Activities should be evaluated continuously throughout the implementation process.



A program logic model visually represents how something is designed to work. It illustrates how a program's resources (inputs), planned activities, products (outputs), and desired changes (outcomes) relate to one another (W. K. Kellogg Foundation, 2004). Check out this [logic model template](#) to visualize how your implementation workplan's activities influence outcomes and consider where you can adjust to align with your context



Stage 1. Plan

- Communication: Your strategies – including how often, what format, how much, and what type of information – should define how you will communicate with your key partners.
 - Create this plan based on your identification of key partners.
- Sustainability: These considerations will address how any introduced changes or practices will be maintained and integrated into long-term operations.
- Risk management: Plan to proactively mitigate any challenges by drawing on some of the facilitators you've identified.



The [Program Sustainability Assessment Tool](#) can help you understand what might affect the sustainability of your project. It looks at eight domains relevant to sustainability, including:

- Funding stability.
- Partnerships.
- Communications.
- Organizational capacity.
- Program evaluation.
- Program adoption.
- Strategic planning.
- Environmental support.



Document everything in your implementation workplan. Here is a [template](#) you can adapt and an example of a completed implementation workplan.

Get feedback

Getting feedback from your team and key partners can help you gauge whether your workplan aligns with their needs and expectations. Feedback also ensures you've identified any unforeseen challenges or opportunities. When feedback is received, it should be carefully considered and used to inform any changes to your plan. This might mean adapting timelines, revising strategies, or realigning resources.

Ultimately, your implementation workplan is a dynamic tool that will be continually adjusted and revisited. Consider the following strategies for gathering and addressing feedback during your implementation process.

Stage 1. Plan

- Offer your partners a variety of ways to provide their feedback and encourage constructive and detailed responses. Some ways to get feedback on your draft workplan could include:
 - Meeting with all members of the implementation team.
 - Discussing with leadership.
 - Surveying relevant key partners.



Test for any assumptions! The [Health Equity Impact Assessment \(HEIA\)](#) is a decision support tool that is used to think through equity and health outcomes. This tool can identify unintended potential health impacts of a policy or program by assessing its impacts on vulnerable populations. Once you know what these impacts might be, you can make evidence-based decisions about adjusting your implementation workplan.



Stage 2. Do

You've created an implementation workplan, and now is the time to put your plan into practice! All your work preparing people and systems for change will set the foundation for your next steps.

Let's do it! Track your progress:

In this section	What you will do	Resources
<input checked="" type="checkbox"/> Action your plan	<ul style="list-style-type: none"> Follow your implementation workplan. Embed change management strategies. Conduct training and capacity building. Participate in collective spaces. 	<ul style="list-style-type: none"> A guide to culturally adapting mental health and addictions programs. Community of practice toolkit.
<input checked="" type="checkbox"/> Start small	<ul style="list-style-type: none"> Pilot-test your project. 	
<input checked="" type="checkbox"/> Use improvement cycles	<ul style="list-style-type: none"> Improve quality. 	<ul style="list-style-type: none"> PDSA cycles. Monitoring and response plan.

☑ Action your plan

Follow your implementation workplan

Put the activities in your implementation workplan into practice.

You may need to tailor your strategies to address specific barriers, promote equity, or respond to local needs. For instance, if attending in-person training is difficult for people because of timing or limited resources, the training may need to be delivered online. While adaptations are a reality, beware of altering the core components. This can have both intended and unintended impacts on outcomes (Kirk et al., 2020). Here are some things to consider.

- The process of implementation can take a long time. Keep your expectations realistic.
- Putting strategies into action can be challenging because they require changing how people act. Try using multiple strategies to bring about your change.
- Conduct a fidelity assessment to measure your progress. Fidelity is the degree to which your project is delivered as intended (Breitenstein et al., 2012). Fidelity is generally measured across five areas (An et al., 2020; Dane & Schneider, 1998; Durlak & DuPre, 2008; Dusenbury et al., 2003):
 - Adherence to core components.
 - Level of exposure or “dose” of experiences (for example, number of sessions, attendance, or frequency and duration).
 - Quality of practice delivery.
 - Level of participant involvement and responsiveness.
 - How the project differs from other interventions.
- Remember to continue:
 - Meeting with your implementation team regularly.
 - Updating leadership and key partners on progress and challenges, as needed.
 - Revisiting your implementation workplan to include any changes or observations.

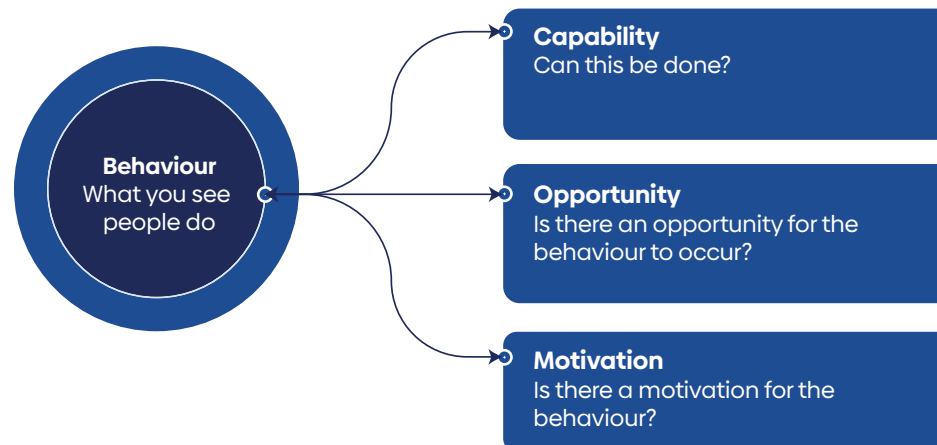


Review [A guide to culturally adapting mental health and addictions programs](#) to learn about adapting evidence-based programs for different cultures.

Stage 2. Do

Embed change management strategies

Whatever the scale of change, it's common to feel unease and trepidation towards something new. People's capabilities, opportunities, and motivations influence their behaviours. The COM-B model is a structured framework for targeted engagement and communication (Michie et al., 2011). This can lead to more effective behaviour change strategies, better alignment of interest, and improved collaboration.



Change management strategies can facilitate a smooth transition towards a desired change or future state. Implementing a new change will have implications for staff, partners, and beneficiaries like young people and family members, so managing these different expectations is important. Elements of a thoughtful change management process include (Collective Impact Forum, 2017):

- Communicating changes and the need for change early on so people have time to prepare.
- Showing empathy for any concerns about the change.
- Being transparent about how and why decisions are made, and by whom.
- Acknowledging how changes will achieve your outcome goals and any losses that might occur because of the change.
- Describing the transition process for people to incorporate the change into their work and sustain it.

Incorporate a change management model to guide your project. Many models describe factors needed to act on people's motivations and abilities to change.

Stage 2. Do

Conduct training and education

Training and education are common strategies that can increase capacity, knowledge, and skills about a specific practice. Training involves developing knowledge through exploring theory, demonstrating or modelling the new skill, practicing the skill, and coaching (Joyce & Showers, 2002). For example, training would be required when implementing a new evidence-based treatment approach in your agency. Additional resources and tools like job aids, manuals, and toolkits should be accessible and aligned with adult learning principles.

Remember that training is rarely a one-time event. It should be a continuous or regular process that results in an expected change sustained over time. To help get started, consider these approaches:

- Conduct a learning needs assessment for your desired audience.
- Talk to your partners.
 - Ask: Are there opportunities to share the training?
- Use internal resources and expertise (existing content, qualified staff).
- Integrate adult learning principles (University of Toronto, 2020a):
 - Encourage active participation through different modalities, like case studies or discussion groups. Provide opportunities to apply what is learned.
 - Make sure the place where you are learning is physically and psychologically safe.
 - Acknowledge participants as equals and value their previous experiences.
 - Get feedback and evaluate the effectiveness of the training.
- Use train-the-trainer strategies. Train people in your organization who can then train others in the new practice.



Coaching is another implementation strategy. Coaching is a guided process that can facilitate change or growth towards achieving a specific goal. Support, mentorship, and supervision are all forms of coaching that can help individuals, organizations, and systems adopt new ways of thinking, develop skills, and sustain rapid changes (Centre for Addiction and Mental Health [CAMH], n.d.). These are especially important during the implementation process. Various organizations provide coaching and training to support specific needs. For example, the Knowledge Institute has developed coaching programs to support organizations and communities as they work to embed [quality improvement](#) or [engagement](#) within their work.

Stage 2. Do

Participating in collective spaces can foster collaboration, knowledge-sharing, problem-solving, and skill-building. These virtual or physical spaces provide a platform for individuals and teams to connect with others facing similar challenges.

Participate in collective spaces

Examples of collective spaces include:

- Professional or academic networks.
- Online forums.
- Conferences.
- Workshops.
- Expert tables.
- Communities of practice (CoPs).

Over the years, the Knowledge Institute has hosted many collective spaces. For example, we support a dedicated space for people implementing the quality standard for youth engagement and quality standard for family engagement. CoP members from the sector participate by sharing knowledge, solving problems, and building skills related to engagement. In a recent evaluation, CoP members reflected that this collective space has helped them develop new approaches or ways of thinking and foster new partnerships with others.



If you don't have a collective space established, think about creating one with your team and inviting others. You can start small and build as you go.

- CoPs are organized groups of people who meet regularly because they share a common interest in a dedicated area. CoPs want to coordinate their efforts to achieve goals or advance knowledge in an area (World Bank Group, 2021). The [WBG Community of Practice Toolkit](#) has a lot of resources you can use to design, develop, and manage CoPs.

Stage 2. Do

☑ Start small

Pilot-test your project

Starting with a pilot project can help you refine your implementation strategies on a smaller scale before fully deploying or expanding. Think about initiating any changes with or within:

- A single staff department or service team.
- A specific client population.
- A shorter time.
- Smaller geographical areas.
- A limited number of clients.
- Champions of your project.

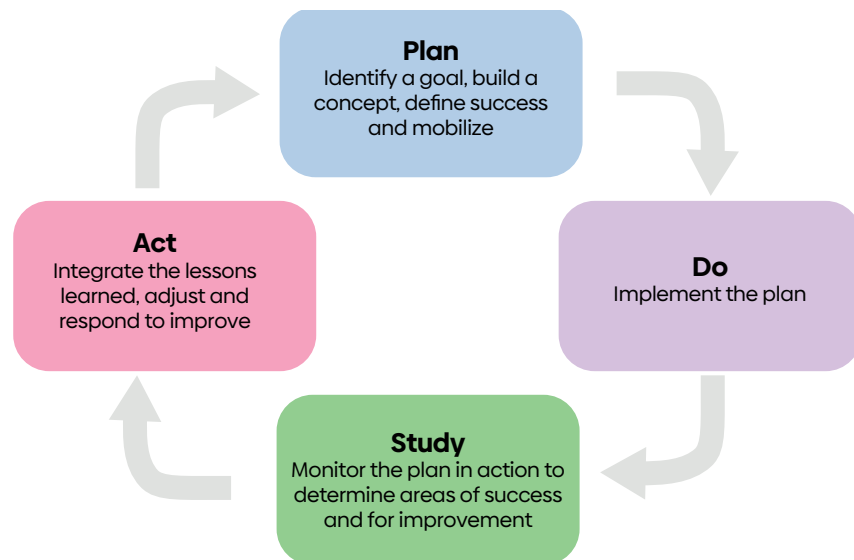
Use evaluation results from your pilot to inform any following iterations of your strategies.

☑ Use improvement cycles

Improve quality

An effective method to advance your outcomes and build sustainability is through plan, do, study, and act cycles (PDSA cycle). The PDSA cycle can guide system change and promote continuous improvement (The W. Edwards Deming Institute, 2022). Using a PDSA cycle will strengthen your ability to review and revise your implementation project as you move through each stage. The cycle has four stages and works as a cyclical process:

Stage 2. Do



Plan:

- Identify your objective.
- Record your questions and predictions.
- Plan who, what, where, and when you will carry out the cycle.
- Plan for data collection.

Do:

- Follow through on your plan.
- Document your observations and collect data.

Study:

- Analyze data and compare it to your predictions.
- Summarize what was learned.

Act:

- Use information and evidence from the Study phase to make necessary changes.
- Integrate lessons learned and users' experiences to make modifications.
- Address any challenges as they arise.



Through each improvement cycle, you can work with your team to adapt this [monitoring and response](#) plan to track and analyze any changes you've made. You can collect data on each measure (from the objectives in your implementation workplan) and decide if any actions are needed to help you stay on track.



Stage 3. Sustain

After initial implementation, we focus on monitoring and reviewing the project's impacts. The lessons learned from our review help ensure that the new project or activity is sustained over time. Sustainability means that what was implemented has become an integrated way of working. Without sustainability, we would implement new things without benefiting from previous efforts.

You did it! Track your progress:

In this section	What you will do	Resources
<input checked="" type="checkbox"/> Evaluate your progress	<ul style="list-style-type: none"> • Conduct an evaluation. • Summarize your findings. 	<ul style="list-style-type: none"> • Program evaluation toolkit. • RE-AIM framework. • Evaluation report.
<input checked="" type="checkbox"/> Maintain momentum	<ul style="list-style-type: none"> • Celebrate wins. • Share your findings. 	<ul style="list-style-type: none"> • Knowledge mobilization toolkit.
<input checked="" type="checkbox"/> Scale up	<ul style="list-style-type: none"> • Grow your success. 	<ul style="list-style-type: none"> • Hexagon tool. • Map2Adapt.

☑ Evaluate your progress

Conduct an evaluation

Evaluation involves systematically collecting information and analyzing it to see how well you did what you set out to do. It tells you how you are doing and helps identify changes that need to be made to help you achieve your goals.

There's no single way of doing evaluation. The evaluation you develop for your project will depend on your needs and circumstances, the strategies used, and the changes you want to see. Common elements of evaluation include (Patton, 2021):

- Planning your evaluation.
- Collecting and analyzing information about project activities and outcomes.
- Using the evidence to improve project effectiveness.

You can evaluate whether your project is moving forward as you planned (process evaluation) or whether the desired changes are being achieved (outcome evaluation). Either approach will provide you with a comprehensive view of your project's strengths and areas for improvement.



For resources to support planning, doing, and using evaluation, check out our program evaluation toolkit, [Clearer insights, greater impact](#),



The [RE-AIM framework](#) can be used to monitor five major outcomes of implementing your project. Here are some sample questions related to each element that can be used to guide your evaluation:

- Reach: How many people were exposed to the implementation project? How does this participation compare to the target?
- Effectiveness: What positive changes or improvements were observed?
- Adoption: Who adopted the changes, and what facilitators and barriers affected its uptake?
- Implementation: Was the project delivered as intended? Were any modifications made?
- Maintenance: What factors contributed to sustainability? How long since it was initiated?

Stage 3. Sustain

Summarize your findings

Communicating your evaluation results can promote understanding, informed decision-making, and action. Depending on your audience, you can showcase your findings through an evaluation report, presentation, or infographic.

Here is an example of a longer evaluation report ([Evaluation report: Transition to virtual care](#)) that assessed changes to child and youth mental health service delivery in response to COVID-19. This report can give you some ideas about the types of information you might want to include.



Evaluation reports are the most popular way of summarizing and presenting evaluation findings. You can adapt [this template](#) and these headings to structure an evaluation report:

- Introduction.
- Evaluation methods.
- Data analysis.
- Results.
- Limitations.
- Discussion and recommendations.



Recommendations are actionable statements based on the information collected during your evaluation (Fraser Health Authority, 2009).

Developing effective recommendations requires careful consideration.

Follow these steps to make recommendations that drive positive change (Feinstein, 2019):

- Collaborate with key partners.
- Establish a solid connection to evidence.
- Focus on one idea at a time.
- Keep it feasible.
- Define responsibility for following through.
- Identify any risks associated with the recommendations or related actions.
- Use clear language.

Stage 3. Sustain

To learn more about knowledge mobilization strategies, refer to our knowledge mobilization toolkit, [Doing more with what you know](#).

☑ Maintain momentum

Celebrate wins

There are many advantages to celebrating your progress. Sharing successes with your team ensures that everyone knows the impact of their work. It also increases buy-in for changes that may affect the way people work.

- Start your team meetings by checking off items on the implementation workplan.
- Continue to communicate and host regular team meetings.
- Voice your appreciation for your team's contributions.

Share your findings

Sharing the positive outcomes of implementing your project can engage other staff as champions and inspire other organizations to replicate your successes, leading to a broader impact in the sector. Sharing progress from your evaluation and lessons learned can help secure additional resources and promote transparency and accountability to all partners.

Mobilizing ensures that knowledge is accessible, understandable, and useful. When developing knowledge mobilization strategies, consider who you want to reach and what they need to know. Consider your messages, tone, timing, and setting for disseminating information based on your audience. Regardless of the form, communication should always be (World Health Organization, 2017):

- Accessible.
- Actionable.
- Credible.
- Relevant.
- Timely.
- Understandable.

Everyone has different preferences when it comes to accessing and using knowledge. Once you have determined what information you want to share, why it is essential to mobilize it, and who your target audience is, think about sharing your findings. Consider using:

- Infographics and fact sheets.
- Webinars and conference presentations.
- Reports or journal articles.
- Social media campaigns.
- CoPs and community tables at the local service and provincial levels.

☑ Scale up

Grow your success

Scaling refers to expanding and sustaining positive change to reach more people, whether within your organization or in regional or national settings (Centre for Effective Services [CES], 2022; Perla et al., 2013). You may need to increase available resources, funding, and capacity to do this. You will also need to determine if scaling up will continue to achieve the same outcomes and benefits for everyone (CES, 2022).

Not all projects may be appropriate for scaling up. This is particularly relevant if you plan to implement in a different region, organization, or population (Barker et al., 2016). If you prepare to scale up, ask if your project (National Health Service, 2017):

- Is meaningful to people.
- Addresses a significant opportunity or gap.
- Fits local context.
- Connects with people's emotions and values.
- Has been successful so far, before scaling.

Challenges often arise when scaling up, including resource constraints, resistance, or lack of cultural fit in new contexts (Barker et al., 2016; CES, 2022). Like initial implementation, scaling requires careful planning and adaptation. The goal of adaptation is to improve equity and access, enhance buy-in, and to leave the core components unchanged (Moore, 2019). Adaptations can occur by modifying things like frequency, adding or removing resources, tailoring and refining content (like in training), or targeting different levels of delivery (individual, organization, or system) (Stirman et al., 2013).

Stage 3. Sustain



[Map2Adapt](#) is a 6-step model to help you decide if your project is a good fit and if you should proceed with adaptations.

1. Define WHO, WHAT, and HOW.
2. Involve people.
3. WHY are you adapting?
4. What are you adapting?
5. Describe adaptations.
6. What is the impact?

You may need to revisit where you build partnerships and readiness or address barriers and facilitators. This should be based on any new findings you have gathered by evaluating your progress. We recommend returning to activities in the Plan stage to determine the additional value of scaling up and assess the feasibility of expanding.

- Return to your sustainability plan and make any adjustments.
 - Ask: Are we still on track with what we set out to do?
- Use the Hexagon tool to explore the fit of implementation.



Moving forward together

Regardless of where you are in the implementation process, you are moving ideas to action and creating impact. We have explored how to plan for implementation, including engaging key partners and assessing your context. We have looked at what implementation might look like, including starting small and continuously improving. Finally, we discussed how to sustain implementation to evaluate and scale up your project.

As you continue with your work, we suggest checking out our other toolkits for ways to take your work to the next level:



- [Clearer insights, greater impact: A program evaluation toolkit.](#)
- [Walking the talk: A toolkit for engaging youth in mental health.](#)
- [Doing more with what you know - Knowledge mobilization toolkit.](#)



If you have questions about this toolkit, please get in touch with us at: The Knowledge Institute: info@cymha.ca.

Glossary

Champion is an individual who can help facilitate change by showing an interest or commitment. Champions can be subject matter experts or demonstrate enthusiasm towards the implementation process (Bonawitz et al., 2020).

Change management is a collective term describing an approach to prepare, support, and help individuals, organizations, or systems to make a change. Change management models outline the process and steps of change management.

Coaching refers to supporting individuals, organizations, or systems to adopt and apply new skills, behaviours, or principles that improve outcomes. Coaching is delivered by a trained professional (a coach) to guide, support, or encourage others to achieve specific goals (CAMH, n.d.).

Community of practice (CoP) is a group of people who come together because of a shared interest or goal, who will exchange knowledge and solve problems about a specific topic.

Core components are fundamental elements required for the proper functioning of an evidence-based practice (Blasé & Fixsen, 2013; Fixsen et al., 2009).

Dissemination is the act of communicating and translating things like information. Dissemination and implementation research is a field that applies frameworks, theories, and models to close the gap between research and practice (Shelton et al., 2020).

Evidence-based practice integrates high-quality research evidence, practitioner expertise and judgement, client data, and the perspectives of children, young people, families, and caregivers (Knowledge Institute on Child and Youth Mental Health and Addictions, 2023).

Fidelity assesses how exactly a program, intervention, practice, or treatment adheres to its original design or intended way of use.

Frameworks describe factors that influence implementation outcomes or aspects of implementation (Nilsen, 2015).

Implementation means putting a plan, thing, or idea into action.

Implementation drivers are facilitators that contribute to successful implementation. There are three categories of implementation drivers: competency drivers, organizational drivers, and leadership drivers (Fixsen et al., 2015).

Implementation practice is the application of evidence from implementation science to different contexts and settings to improve outcomes (Metz, 2019).

Implementation process is the undertaking of activities that follow stages in an implementation model.

Implementation project is the thing that is being implemented.

Implementation science is the study of methods to help put research into practice. It connects research evidence with real-world use for better outcomes. In our sector, it can be used when creating new policies or innovations, putting evidence-based programs into practice, or turning ideas into action.

Implementation strategies are actions or processes that can increase the likelihood of implementation and outcome success (Powell et al., 2015).

Implementation team is a group of partners that oversee, manage, and support the implementation process.

Knowledge mobilization encompasses a range of activities, including knowledge synthesis, dissemination, transfer, and exchange. The goal is to make evidence accessible, clear, and useful for those who need it (knowledge users) (Knowledge Institute on Child and Youth Mental Health and Addictions, 2023).

Logic model is a visual representation of how a program works to solve a problem or fill a need.

Learning needs assessment is a tool used to identify the current knowledge, skills, and abilities of individuals or a group and what knowledge or skills they need to develop.

Learning organization is an organization committed to continuous

Glossary

improvement by creating, acquiring, and transferring knowledge and making changes to reflect best practices.

Model describes stages in a process that can guide the translation of research into practice (Nilsen, 2015).

Practice profile is a tool to help identify core components and key associated activities (Metz, 2016).

Quality improvement is a systematic approach to enhancing the effectiveness, efficiency, and reliability of processes or services.

Readiness refers to the extent that an individual, organization, or system is prepared to, willing, and able to adopt and sustain a new program, intervention, or change. There are many types and examples of readiness assessments that can evaluate an organization's preparedness to undertake implementation. Readiness assessments should be chosen based on the scope and objectives of your project.

Scale up is the process of expanding and sustaining the coverage, range, and reach and of a successful policy, program, or project (CES, 2022).

Theories predict or explain the underlying causal mechanisms of implementation (Nilsen, 2015).

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