

Introduction

This form provides a semi-structured approach to documenting observations, challenges, and facilitators that may arise during an implementation study. The goal of this form is to enable teams to gather insights into factors influencing the implementation of their specific intervention without placing additional burden on staff or requiring extensive resources. It may be particularly useful for teams with limited capacity to conduct interviews or surveys but who wish to systematically consider and document key implementation factors.

Instructions for Use

When to Use This Form:

- During regular activities, such as team meetings or community partner discussions, when implementation factors may naturally arise.
- When resources for traditional data collection methods, such as interviews or surveys, are limited.
- When you want to minimize the workload for your team while still capturing relevant implementation-related data

How to Use This Form:

- Identify key moments or activities in your study where implementation-related observations can be recorded (e.g., team meetings, progress updates, stakeholder feedback sessions).
- Use the form to document relevant factors such as barriers, facilitators, contextual influences, and any adaptations made to the intervention or study procedures.
- Ensure that entries are concise but detailed enough to provide meaningful insights.
- This form includes an exhaustive list of potential implementation factors; **not every box needs to be filled out at every meeting**, and some items may not apply to your specific context. Use it as a broad guide to capture what is relevant to your study.

What to Consider:

- Tailor the form to align with your study's specific goals and the nature of the intervention being implemented
- Encourage multiple team members to contribute observations to ensure a comprehensive understanding of the implementation process
- Review the completed forms regularly to identify emerging patterns or trends that may warrant further exploration.

Example Form

Context: This study is a pilot program testing a training protocol for healthcare providers across multiple sites. The goal is to improve adherence to evidence-based maternal care practices by implementing a structured training program. The study involves both an urban hospital (Site A) and a rural clinic (Site B), allowing researchers to examine how contextual factors influence implementation. Challenges such as resource limitations, provider engagement, and training format adaptations are being assessed to refine the protocol before broader dissemination.

Meeting Template

Meeting Name	Implementation Team Check-In
Topic of Meeting	Progress Review of Training Protocol Implementation
Date	February 4 th , 2025
Time	10:00 AM EST
Location	Zoom
Site Name	Site A (Urban Hospital), Site B (Rural Clinic)
Participants names/roles	Dr. Smith (PI), Dr. Lee (Co-PI), Nurse Taylor (Site A Coordinator), Dr. Patel (Site B Lead), Research Assistant Jordan
Facilitator	Dr. Smith

Discussion Summary	
Current Phase of Implementation	
What is the current phase of the implementation?	Planning Early implementation Mid-implementation Sustainment Other
Intervention <i>Evidence-based practice, “the thing”, etc.</i>	
Describe any changes made to the intervention itself, the context, the people conducting the intervention, the people receiving the intervention?	<ul style="list-style-type: none"> • Site B adapted training to asynchronous modules due to connectivity issues • Training documentation requirements streamlined to reduce administrative burden on providers • Additional coaching sessions added to Site A in response to provider feedback
Implementation Determinants <i>Factors that influence the ability to implement the intervention</i>	
What has been getting in the way of implementing the program?	<ul style="list-style-type: none"> • Limited internet access at Site B affected virtual training participation • Scheduling conflicts made it difficult for providers to complete sessions on time

	<ul style="list-style-type: none"> Some providers felt that the new protocols increased their workload
Who has raised these concerns?	<ul style="list-style-type: none"> Providers at both sites, particularly those at Site B Research assistants tracking training completion
What patterns if any have you observed in determinants?	<ul style="list-style-type: none"> More engagement at Site A due to familiarity with structured training programs Rural providers (Site B) experiencing more difficulties due to resource constraints
What strength(s) exist within the setting related to the implementation?	<ul style="list-style-type: none"> Strong buy-in from leadership at Site A Enthusiasm from early adopters who see the benefit of the training
How are communities overcoming/engaging with these determinants?	<ul style="list-style-type: none"> Site B providers requested on-site troubleshooting support Site A is mentoring Site B staff in overcoming early implementation challenges
Implementation Strategies <i>What we do to help our target population to receive the intervention</i>	
What approaches have been used?	<ul style="list-style-type: none"> Virtual and in-person training sessions Peer mentorship from experienced providers Weekly check-in to assess progress and address concerns
Who is using them?	<ul style="list-style-type: none"> Research team facilitating virtual sessions Site A staff mentoring Site B providers
What problems, concerns, or clear gaps are present related to these strategies?	<ul style="list-style-type: none"> Need for more flexibility in training schedules Providers at Site B need additional tech support to access modules
Engagement with Community Partners	
Which community partners have been involved in identifying barriers/solutions? Describe	<ul style="list-style-type: none"> Local health department providing technical assistance for internet connectivity Regional medical association supporting provider engagement
Context	
What situational or environmental factors influencing the discussions?	<ul style="list-style-type: none"> Site A has a history of structured training programs, making implementation smoother Site B faces systemic barriers such as staffing shortages and tech limitations
Follow-Up Actions	
What follow-up tasks were assigned?	<ul style="list-style-type: none"> IT team to troubleshoot internet issues at Site B

	<ul style="list-style-type: none">• Research assistants to monitor training completion rates and report gaps• Next meeting to include a feedback session with providers
Observer Reflections	
What stood out most about this discussion?	<ul style="list-style-type: none">• Site B requires additional engagement and troubleshooting to ensure successful implementation
Describe any notable dynamics or trends.	<ul style="list-style-type: none">• Enthusiasm for training is higher among providers who have completed early sessions• Peer mentorship seems to be a promising strategy for overcoming early barriers