

Guideline Implementation Planning Checklist

Steps and consideration	References
<i>Implementation planning</i> —instructions for when and how to plan and prepare for implementation	
Implementation should be considered at the beginning, and throughout the guideline development process	[26-29]
Form an implementation team from the start that includes stakeholders (patient groups, end users, champions, relevant organizations and agencies, policy-makers) and one or more knowledge translation experts	[26-28,30-33]
Identify and assemble resources for implementation	[27,34]
Audit current practice as a baseline needs assessment	[32]
Consider or assess barriers of guideline implementation and use (patient, professional, organizational, system, economic, political, social/cultural), and stakeholder needs and preferences through literature review, observation, focus groups, interviews or survey	[27,30-39]
Consider dissemination and/or implementation on a recommendation-by-recommendation basis rather than for entire guideline	[33]
Determine the dissemination and implementation strategies that are effective and best suited to address identified needs and barriers	[27,30-36,40]
Determine what implementation tools will be developed based on: guideline scope; guideline recommendations; identified knowledge gaps or baseline audit; interviews or focus groups with guideline users	[30,35,40,41]
Develop an implementation plan describing dissemination and implementation strategies and tools, roles and responsibilities, milestones, time frames, and implementation measures	[26-28,32,38,42]
Consider pilot testing the implementation strategy on a small scale and adjust as needed after the pilot test and on an ongoing basis	[32,34,38]
Continue to engage stakeholders with outreach and education throughout the guideline development process	[27,30-33,40]
Ensure guideline recommendations are implementable and can be integrated in computer decision support systems	[35,41]
<i>Implementation tools</i> —instructions for developing guideline content, versions, or tools that support implementation	
Research potential designs for type(s) of tools selected	[30]

Identify resources that will be needed	[30]
Present draft tool to guideline development group	[30]
Refine the tool with feedback, and several iterations may be needed	[30]
Test tool usability with clinician or patient interviews or focus groups	[30]
Feedback is used to refine the tool	[30]
Final version is reviewed by the guideline development group	[30]
Implementation tools are published at the same time as the guideline	[26]
<i>Potential implementation tools include:</i>	
Versions in different languages	[27,28,43]
Versions in different formats (mobile devices, pocket guide, wall poster)	[26,29-31,44-47]
Summary versions (short version, recommendations only, evidence only)	[26,28,29,32,35,37,38,42-44,46-51]
Patient or plain language version	[26,27,35,43,46,48,49]
Point-of-care tools (algorithms, checklists, decision aids)	[27,28,35,36,38,48-50,52]
Electronic medical record/computer decision support system integration	[30]
Implementation plan (recommended strategies, barriers specific to the guideline and its recommendations, instructions)	[28,36,43,48,53,54]
Teaching aids (slide set, case examples, meeting agenda)	[27,42,47,49,52,53]
Patient and caregiver resources	[28,32,35,36,45,48,50,52]
Resource planning guide (human, infrastructure, technological capacity needed to implement and apply the recommendations)	[36,48]
Costing tools (spreadsheet, report templates)	[26,53]
Evaluation plan (instructions, measures, data collection instruments)	[26-28,32,35,36,39,45,48,50,53]
<i>Dissemination and implementation—strategies for distributing, sharing, promoting and applying guideline recommendations</i>	
<i>Dissemination options include:</i>	
Web site (guideline, implementation tools, accredited CPD modules)	[26,27,29,30,35,37,42-49,51,55-57,59,60]
Journal publications (which can link to online material)	[31,35,47,49]
Press release	[27,30,32-34,41]
Mass media campaign	[35,44,49]
Email distribution	[35,45]
Podcast or webinar	[35]
Register with AHRQ Guideline Clearinghouse and G-I-N Library	[35]

Partnerships (national organizations, networks)	[26,31,45]
Endorsement by specialty society	[31,45]
Marketing strategies	[31]
Traditional arts	[31]
<i>Implementation options include:</i>	
Printed educational material	[31-34,36,40,41]
Educational meetings (conferences, workshops, CPD)	[26,30-36,39-42,44,46,60]
Educational outreach/Academic detailing	[32-34,36,40,41,60]
Local opinion leaders	[32-34,36,40,41,60]
Audit and feedback	[32-34,36,40-42,60]
Reminders	[32,33,36,39-41,60]
Multi-faceted interventions	[32,36]
Patient-mediated interventions (educational material, decision support tools, mass media campaign, reminders)	[32-43,40]
Organizational interventions (revision of professional roles or teams, leadership engagement)	[33,34,40]
Financial incentives or penalties	[32,33,41]
Computer decision support systems	[33,41]
Regulatory interventions/accreditation	[33,41,42]