



Interactive elements



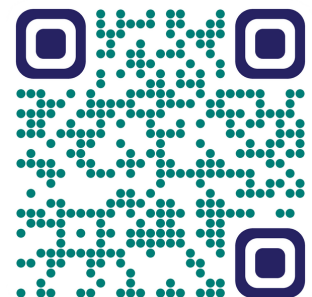
Handout

StrategEase: The HOW of Creating Sustainable Change

CHCA Sprint

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Feb 28, 2024



The Center for Implementation

About us

Founded in 2018, The Center for Implementation (TCI) is a social enterprise with a mission and moral imperative to train, support, and empower professionals in using evidence-informed approaches to maximize their impact.

Our vision is to see millions of changemakers worldwide actively applying best practices in implementation science to their initiatives.

In working towards this vision, we prioritize an entrepreneurial and values-based approach that embraces equity, empathy, creativity, and collaboration. [Learn more about us and what we do.](#)

Our services

We provide expert guidance and deliver practical solutions to organizations across multiple fields. We develop customized implementation support packages, partner on large-scale initiatives, and design professional development workshops tailored to specific contexts. [Learn more about our services.](#)

For teams and individuals, we offer comprehensive [online training](#), Implementation Support Specialist [certification](#), and the [Implementing Change Community](#) – a unique online space for changemakers to share knowledge and connect with each other.

Citation information

If using the workshop materials in a publication, please include this citation:

The Center for Implementation. (2023). *Cheat Sheet - StrategEase: The HOW of Creating Sustainable Change*.

For a presentation or any other grey literature, include “pulled from The Center for Implementation” or “adapted from The Center for Implementation” on each item (e.g., every slide that references our content).

We ask that you provide citations in writing (not just verbally).

StrategEase Pathway

By drawing from the scientific literature as well as our own experiences supporting 100+ implementation projects, this pathway lays out 4 major steps to guide you through the process of creating any kind of change.

This pathway is conceptualized as a bridge from evidence to practice that helps to guide people through the process of defining their initiatives. It includes both technical components and relational components.

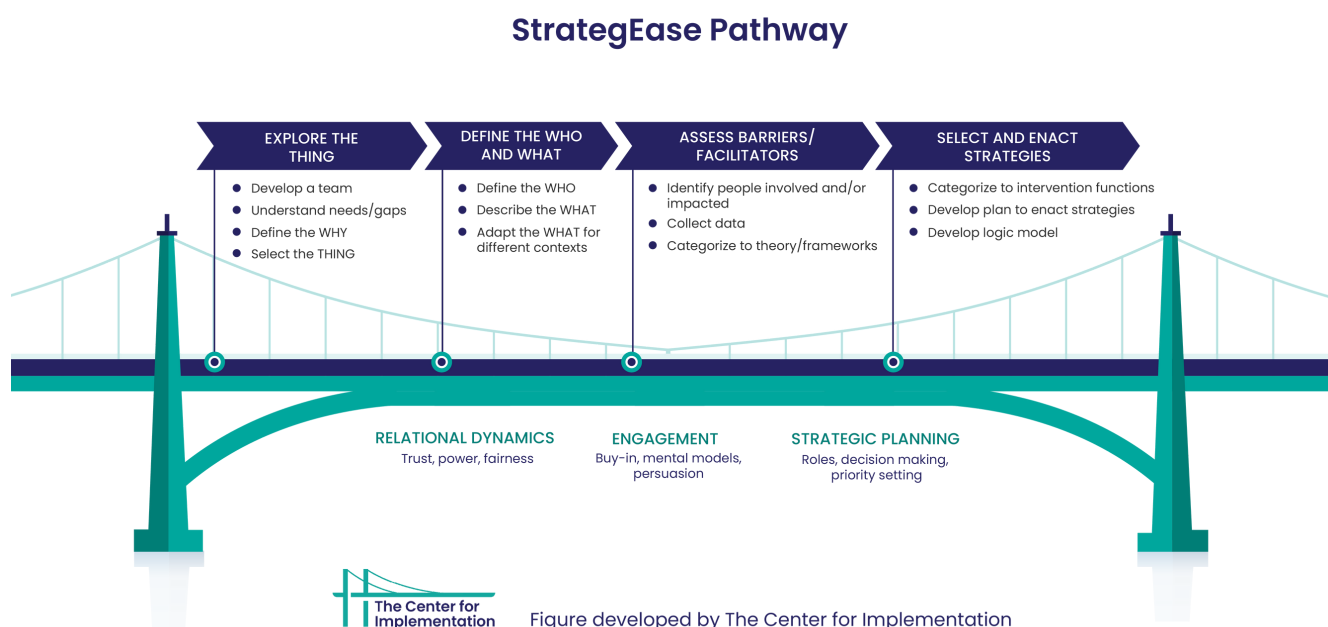


Figure specifications

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How to cite this figure

Moore, J. E., & Khan, S. (2021). StrategEase Pathway. *Implementation in Action Bulletin*. Retrieved from:

<https://thecenterforimplementation.com/toolbox/strategease-pathway-designing-initiatives>

Explore the THING

Goals of this step

Here's where you will explore the THING that needs to be implemented.

In this step, you will understand:

- The purpose of implementation teams and how to develop an implementation team.
- The importance of distinguishing between a need and a gap.
- How defining the WHY and what success looks like early on helps to move implementation forward.
- Considerations that can be made when what you are implementing is not evidence-based and how you can think about equity in relation to what you are implementing.

Equity questions related to this step

- Who is informing the nature of the problem? Is the problem being assessed from an upstream perspective?
- Were the right people involved in selecting the THING to solve the problem (e.g., were those impacted by the problem included)?
- What are the outcomes you want the THING to achieve and who do those outcomes matter to?



Define the WHO and the WHAT

Goals of this step

Here's where you will define WHO needs to do WHAT differently in order to implement the THING.

In this step, you will understand:

- How to define WHO is being asked to do WHAT differently and HOW this is related to successful implementation.
- How the nested nature of change impacts how you understand WHO needs to do WHAT differently.
- Why you might need to adapt what you are implementing to different contexts, and different factors you can use to understand what adaptations might need to be made.

Equity questions related to this step

- Have you defined the WHATs with people (versus for people)?
- What current and historical power dynamics exist between the WHOs that might impact the WHATs?
- Are the WHATs feasible, acceptable, useful, accessible, effective, and safe for the people who are expected to perform the WHATs?
- Have you considered adaptations to the WHATs for different populations?



7 Ps

There are multiple different types of WHATs that might be relevant for your work, and the “7 Ps” can be a really great way to help you disentangle which WHATs are relevant for your initiative. These include:

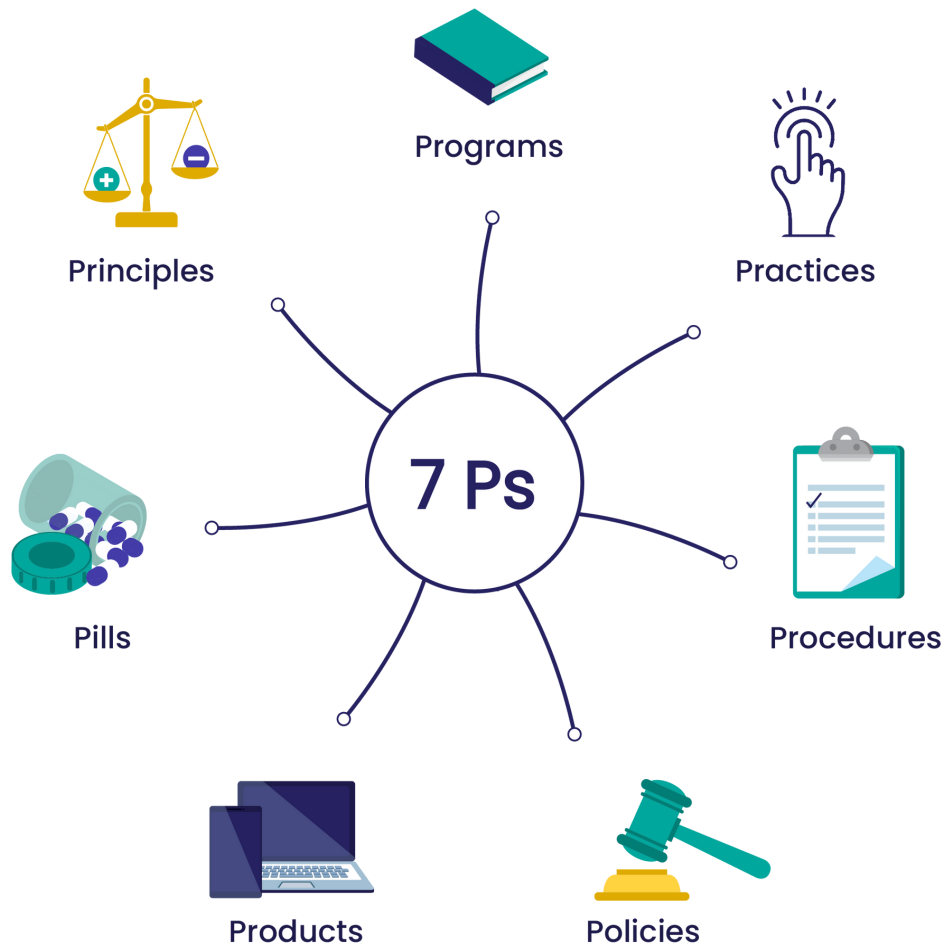


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7 Ps. (2022). Adapted from "An Overview of Research and Evaluation Designs for Dissemination and Implementation," by Brown, C. H., Curran, G., Palinkas, L. A., et al., 2017, Annual review of public health. Copyright by The Center for Implementation. <https://thecenterforimplementation.com/toolbox/defining-what-who-and-how>

WHO, WHAT, and HOW

Most implementation initiatives will have many WHOs — who needs to do different WHATs to make the change happen. Deliberately breaking down each WHO and WHAT can help effectively address barriers and facilitators for each.

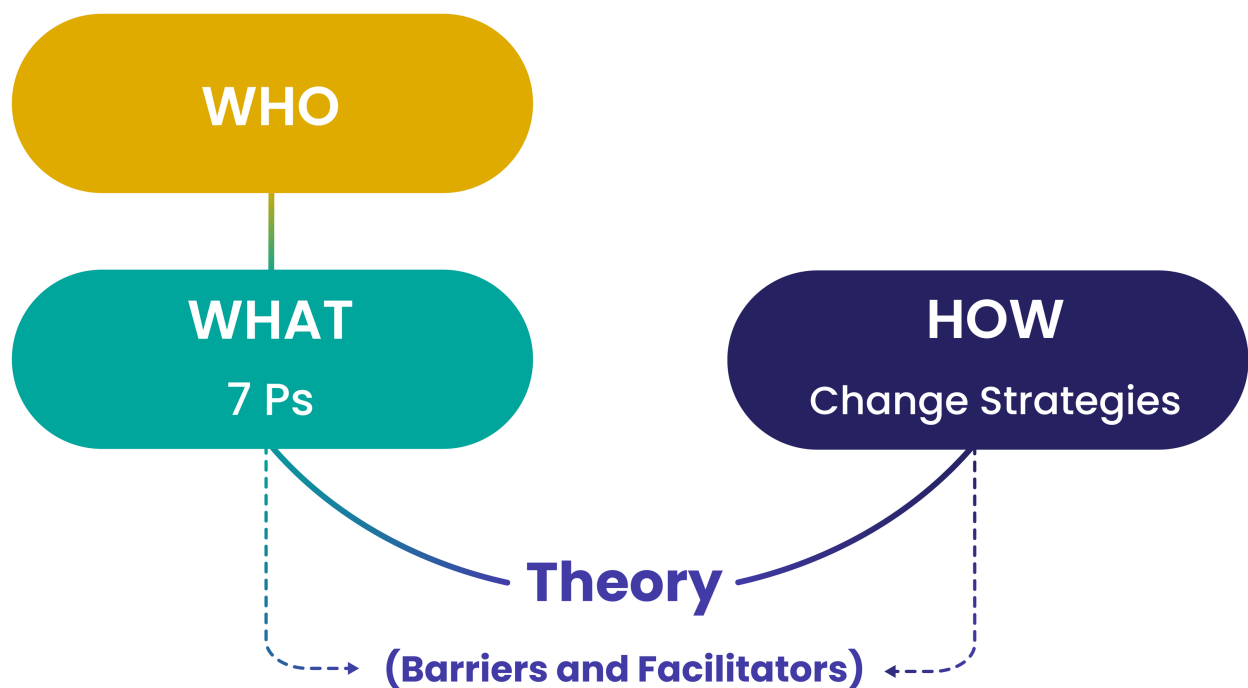


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How to cite this figure

Moore, J. E., & Khan, S. (2021). WHO, WHAT, and HOW. *Implementation in Action Bulletin*. Retrieved from: <https://thecenterforimplementation.com/toolbox/defining-what-who-and-how>.

Assess barriers / facilitators

Goals of this step

Here's where you assess barriers and facilitators that are linked to the identified WHOs and WHATs.

In this step, you will understand:

- How the COM-B (Capability, Opportunity, Motivation–Behaviour) and the TDF (Theoretical Domains Framework) can help you categorize barriers and facilitators to your initiative.

Important to know

- Connecting your WHAT to your HOW requires linking them theoretically and having a good understanding of the barriers and facilitators to change.

Equity questions related to this step

- Are you capturing barriers and facilitators that different populations are facing?
- Are you linking individual barriers with organizational and systemic barriers to understand why individual barriers may exist?
- Are you seeking to understand the WHY for each barrier?
- Have you considered intersectionality?
- Have you asked people directly about their barriers using inclusive approaches (e.g., that mitigate power dynamics to avoid assumptions)?



COM-B + TDF

This figure depicts the combination of the Capability, Opportunity, Motivation - Behavior (COM-B) and Theoretical Domains Framework (TDF).

The COM-B describes how in order for people to change they need to be capable of change, be motivated to change, and have the opportunity to change. The TDF presents 14 domains that describe different types of individual barriers and facilitators people might encounter.



Michie, S., Atkins, L., & West, R. (2014). *The behaviour change wheel: A guide to designing interventions*. Silverback Publishing. www.behaviourchangewheel.com



Figure adapted by The Center for Implementation

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How to cite this figure

COM-B + TDF. (2022). Adapted from "The behaviour change wheel: A guide to designing interventions," by Michie, S., Atkins, L., & West, R., 2014, Silverback Publishing. Copyright by The Center for Implementation.

<https://thecenterforimplementation.com/toolbox/com-b-tdf>

Select and enact strategies

Goals of this step

Here's where you select change strategies that are linked to the function of your mapped barriers and facilitators.

In this step, you will understand:

- The purpose and importance of change strategies.
- How change strategies are related to barriers and facilitators.
- The different purposes change strategies can serve.

Important to know

- A single strategy may fulfill several functions (e.g., identifying and preparing champions can address Persuasion and Modeling functions, a seminar (or a training video) could both fulfill the Education function).
- Certain functions are better suited to address certain types of barriers. Using the Theoretical Domains Framework (TDF) to categorize them facilitates the selection of intervention functions (Types of HOWs) and change strategies.
- Change strategies vary widely, but it is easier to understand them using intervention functions (Types of HOWs), such as Education, Modeling, Persuasion, or Environmental Structuring.
- The StrategEase tool is designed to help you with this process and is free and available for anyone to use.

Equity questions related to this step

- Are you including people making the change and impacted by the problem in selecting HOWs to ensure they are feasible, appropriate, acceptable, and safe?
- Have you considered different HOWs (or adaptations of the HOWs) for people who experience different barriers related to factors such as:
 - Accessibility
 - Ease of participation (time to travel, work schedules, etc.)
 - Cultural competency
 - Historical power dynamics



Functions (Types of HOWs)

This figure highlights the functions (types of HOWs) linked to the Theoretical Domains Framework and COM-B.

Types of HOWs describe the underlying function a change strategy would serve – you can think of this as the “purpose” of the change strategy. They are broad categories in which change strategies can be grouped and should not be confused with change strategies themselves.

	TDF Domain	Educating	Training	Modeling	Persuading	Incentivizing	Enabling	Environmental Restructuring	Restricting
Capability	Knowledge	•							
	Skills		•						
	Memory, Attention, & Decision Processes		•				•	•	
	Behavior Regulation (Habits)	•	•	•			•		
Motivation	Beliefs About Capabilities (Confidence)	•		•	•		•		
	Social / Professional Role / Identity	•		•	•				
	Beliefs About Consequences	•		•	•				
	Emotions			•	•	•	•		
	Goals (I want to)	•		•	•	•	•		
	Intentions (I plan to)	•		•	•	•			
	Reinforcing Behavior		•			•		•	
	Optimism / Pessimism	•		•	•		•		
Opportunity	Environmental Context / Resources		•				•	•	•
	Social Influences (Influenced by others)			•			•	•	•

Michie, S., Atkins, L., & West, R. (2014). *The behaviour change wheel: A guide to designing interventions*. Silverback Publishing. www.behaviourchangewheel.com



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How to cite this figure

Functions (Types of HOWs). (2022). Adapted from "The behaviour change wheel: A guide to designing interventions," by Michie, S., Atkins, L., & West, R., 2014, Silverback Publishing. Copyright by The Center for Implementation.

<https://thecenterforimplementation.com/toolbox/functions-types-of-hows>

StrategEase tool

This tool will help you select change strategies by linking them to theories and frameworks that can help you identify the underlying reasons for change and the types of strategies that can help address these reasons.

[Click here to access the tool.](#)



Considerations

This tool has been developed and designed by The Center for Implementation to help you go through the process of selecting change strategies, a process we explore in detail in our online course [StrategEase: The HOW of Creating Sustainable Change](#).

How to cite this tool

The Center for Implementation. (2022). StrategEase Tool [Web application]. <https://thecenterforimplementation.com/strategease-tool>

Readings and resources

By The Center for Implementation

- [The Implementation, Spread, and Scale Pathway](#) – The Center for Implementation
- [The StrategEase Pathway](#) – The Center for Implementation
- [5 Practical tips for mapping barriers and facilitators to an implementation framework](#) – The Center for Implementation
- [StrategEase tool](#) – a free, evidence-based, interactive tool to help you select change strategies – The Center for Implementation
- [Equitable implementation: Weaving equity into selecting change strategies](#) by Dr. Sobia Khan – The Center for Implementation

Additional readings and resources

- [Making sense of implementation theories, models and frameworks](#) by Per Nilsen
- [The Behaviour Change Wheel. A Guide to Designing Interventions](#). London: Silverback Publishing; 2014.
- [The behaviour change wheel: A new method for characterizing and designing behaviour change interventions](#). Implementation Science 6, 42 (2011) by Michie et al. (2011)
- [A guide to using the Theoretical Domains Framework of behaviour change to investigate implementation problems](#). Implementation Science 12, 77 (2017) by Atkins, L., Francis, J., Islam, R. et al.
- [Toward an evidence-based system for innovation support for implementing innovations with quality: tools, training, technical assistance, and quality assurance/quality improvement](#). Am J Community Psychol. 50 (2012) by Wandersman A, Chien VH, Katz J.