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## Day 1

### Session 1.1

- Silver, M., Colditz, G. A., & Emmons, K. M. The Promise and Challenges of Dissemination and Implementation Research In: Brownson, R.C., Colditz, G.A., and Proctor E.K. (Eds.). *Dissemination and Implementation Research in Health: Translating Science to Practice*, 3<sup>rd</sup> ed. New York: *Oxford University Press*; 2023. p. 3-26.
- Gawande, Atul. Slow ideas: Some innovations spread fast. How do you speed the ones that don't? *The New Yorker*. 2013, July 29.  
<https://www.newyorker.com/magazine/2013/07/29/slow-ideas>
- Grol, R. & Wensing, M. Implementation of change in healthcare: A complex problem. In M. Wensing, R. Grol, & J. Grimshaw (Eds.). *Improving Patient Care: The Implementation of Change in Health Care*. *John Wiley & Sons, Incorporated*; 2020. p. 1-20.  
<https://doi.org/10.1002/9781119488620.ch1>
  - *An excellent overview of how the implementation science challenge is framed. Comprehensive and systematic.*
- Peters D.H., Adam T., Alonge O., Agyepong I.A., & Tran N. Implementation research: What it is and how to do it. *BMJ*. 2013; 347. <https://doi.org/10.1136/bmj.f6753>
- Remme, J.H.F., Adam, T., Becerra-Posada, F., D'Arcangues, C., Devlin, M., Gardner, C., Ghaffar, A., Hombach, J., Kengeya, J.F., Mbewu, A., Mbizvo, M.T., Mirza, Z., Pang, T., Ridley, R.G., Zicker, F., & Terry, R.F. Defining Research to Improve Health Systems. *PLoS Medicine*. 2010; 7(11). <https://doi.org/10.1371/journal.pmed.1001000>
- Rogers, Everett M. *Diffusion of Innovations*. Chapter 1: Elements of Diffusion. New York: *Simon and Schuster*, 2003.
  - *A classic about the spread that is highly relevant for implementation research. Roger's ideas are found throughout the implementation research literature but can also be seen widely in fields such as marketing and others.*
- Geng, E.H., Peiris, D., & Kruk, M.E. Implementation Science: Relevance in the real world without sacrificing rigor. *PLoS Med*. 2017; 14(4).  
<https://doi.org/10.1371/journal.pmed.1002288>
- Beidas RS, Dorsey S, Lewis CC, Lyon AR, Powell BJ, Purtle J, Saldana L, Shelton RC, Stirman SW, Lane-Fall MB. Promises and pitfalls in implementation science from the perspective of US-based researchers: learning from a pre-mortem. *Implement Sci*. 2022 Aug 13; 17(1):55. PMID: 35964095; PMCID: PMC9375077.

## FALL 24 HIGH IRI Reading List

- Hamilton, A. B. & Brown A. Implementation science in health care. In: Brownson, R.C., Colditz, G.A. & Proctor, E.K. (Eds.). *Dissemination and Implementation Research in Health: Translating science to practice*, 3rd Ed. New York: *Oxford University Press*; 2023. p. 454-467.
- Pinnock, H., Barwick, M., Carpenter, C. R., Eldridge, S., Grandes, G., Griffiths, C. J., Rycroft-Malone, J., Meissner, P., Murray, E., Patel, A., Sheikh, A., & Taylor, J.C.S. Standards for Reporting Implementation Studies (StaRI) statement. *BMJ*. 2017; 356. <https://doi.org/10.1136/bmj.i6795>
- Geng, E. H., Nash, D., Phanuphak, N., Green, K., Solomon, S., Grimsrud, A., Sohn, A. H., Mayer, K. H., Bärnighausen, T., & Bekker, L.-G. The question of the question: Impactful implementation science to address the HIV epidemic. *Journal of the International AIDS Society*. 2022; 25(4). <https://doi.org/10.1002/jia2.25898>
- Geng, E.H., Moshabela, M., and Alonge, O. Implementation Science in the Global Context: Novel Applications and Bidirectional Opportunities In: Brownson, R.C., Colditz, G.A., and Proctor E.K. (Eds.). *Dissemination and Implementation Research in Health: Translating Science to Practice*, 3<sup>rd</sup> ed. New Work: *Oxford University Press*; 2023. p. 558-584.
  - *This chapter offers a perspective on implementation science within a global context with a focus on intersection with health systems; introduces a framework for how implementation strategies fit within health system.*
- World Bank. Foreword and Overview In: *World Development Report 1993: Investing in Health, Volume1*. The World Bank, 1993. <https://doi.org/10.1596/0-1952-0890-0>
- Kruk ME, Gage AD, Arsenault C, Jordan K, Leslie HH, Roder-DeWan S, Adeyi O, Barker P, Daelmans B, Doubova SV, English M. High-quality health systems in the Sustainable Development Goals era: time for a revolution. *The Lancet global health*. 2018 Nov 1;6(11):e1196-252. doi: 10.1016/S2214-109X(18)30386-3.

### Session 1.2

- Grol, R.P., Bosch, M.C., Hulscher, M.E., Eccles, M.P., & Wensing, M. Planning and studying improvement in patient care: The use of theoretical perspectives. *The Milbank Quarterly*, 2007; 85(1), 93-138. <https://doi.org/10.1111/j.1468-0009.2007.00478.x>
- Michie, S., Johnston, M., Abraham, C., Lawton, R., Parker, D., & Walker, A. Making psychological theory useful for implementing evidence based practice: A consensus approach. *Quality & Safety in Health Care*. 2005; 14(1), p. 26-33. DOI: 10.1136/qshc.2004.011155
- Nilsen, P. Making sense of implementation theories, models and frameworks. *Implementation Science*. 2015; 10(53). <https://doi.org/10.1186/s13012-015-0242-0>

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- Tabak, R.G., Nilsen, P., Woodard, E.N., and Chamber, D.A. The Conceptual Basis for Dissemination and Implementation Research: Lessons From Existing Theories, Models, and Frameworks. In: Brownson, R.C., Colditz, G.A., and Proctor E.K. (Eds.). *Dissemination and Implementation Research in Health: Translating Science to Practice*, 3<sup>rd</sup> ed. New York: *Oxford University Press*; 2023. p. 861-05.
- Wensing, M. & Grol, R. Theories on implementation of change in healthcare. In M. Wensing, R. Grol, & J. Grimshaw (Eds.), *Improving Patient Care: The Implementation of Change in Health Care*. *John Wiley & Sons, Incorporated*; 2020. p. 22-46.  
<https://doi.org/10.1002/9781119488620.ch2>
- Michie, S., Van Stralen, M.M., & West, R. The behaviour change wheel: A new method of characterising and designing behaviour change interventions. *Implementation Science*. 2011; 6(42). <https://doi.org/10.1186/1748-5908-6-42>
- Damschroder, L.J., Aron, D.C., Keith, R.E., Kirsh, S.R., Alexander, J.A., Lowery, J.C. Fostering implementation of health services research findings into practice: A consolidated framework for advancing implementation science. *Implementation science*. 2009; 4(1), 1-5.  
<https://doi.org/10.1186/1748-5908-4-50>
- **Skivington K**, Matthews L, Simpson SA, Craig P, Baird J, Blazeby JM, Boyd KA, Craig N, French DP, McIntosh E, Petticrew M. A new framework for developing and evaluating complex interventions: update of Medical Research Council guidance. *bmj*. 2021 Sep 30;374.
- Bor, J., & Thirumurthy, H. Bridging the efficacy-effectiveness gap in HIV Programs: Lessons from economics. *Journal of Acquired Immune Deficiency Syndromes*. 2019;82(3), 183.  
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- **Luke DA**, Powell BJ, Paniagua-Avila A. Bridges and mechanisms: integrating systems science thinking into implementation research. *Annual Review of Public Health*. 2024;45.
- Atkins, L., Francis, J., Islam, R., O'Connor, D., Patey, A., Ivers, N., Foy, R., Duncan, E. M., Colquhoun, H., Grimshaw, J. M., Lawton, R., & Michie, S. A guide to using the Theoretical Domains Framework of behaviour change to investigate implementation problems. *Implementation Science*. 2017; 12(77), 1–18. <https://doi.org/10.1186/s13012-017-0605-9>
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- Moullin, J. C., Dickson, K. S., Stadnick, N. A., Albers, B. A., Nilsen, P., Broder-Fingert, S., Mukasa, B., & Aarons, G. A. Ten recommendations for using implementation frameworks in research and practice. *Implementation Science Communications*. 2020; 1(42), 1–12. <https://doi.org/10.1186/s43058-020-00023-7>
- **Bradley CD**, Irie WC, Geng EH. Situating implementation science (IS) in res (IS) tance: a conceptual frame toward the integration of scholarship from the black radical tradition. *Frontiers in Public Health*. 2024 Jan 11;11:1286156.
- **Brownson RC**, Kumanyika SK, Kreuter MW, Haire-Joshu D. Implementation science should give higher priority to health equity. *Implementation Science*. 2021 Dec;16:1-6.
- **Snell-Rood C**, Jaramillo ET, Hamilton AB, Raskin SE, Nicosia FM, Willging C. Advancing health equity through a theoretically critical implementation science. *Translational behavioral medicine*. 2021 Aug 1;11(8):1617-25.
- **Fernandez ME**, Ruitter RA, Markham CM, Kok G. Intervention mapping: theory-and evidence-based health promotion program planning: perspective and examples. *Frontiers in public health*. 2019 Aug 14;7:209.
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  - *This pivotal paper draws attention to the fact that there's still room for conceptualization and theorization in the field of implementation science.*
- Brownson, R.C., Shelton, R.C., Geng, E.H., & Glasgow, R.E. Revisiting concepts of evidence in implementation science. *Implementation Science*. 2022; 17(26). <https://doi.org/10.1186/s13012-022-01201-yf>
- **Alonge O**, Rodriguez DC, Brandes N, Geng E, Reveiz L, Peters DH. How is implementation research applied to advance health in low-income and middle-income countries?. *BMJ global health*. 2019 Mar 1;4(2):e001257.
- **Ngaruiya C**, Muhammad MI, Sam-Agudu NA. A proposed guide to reducing bias and improving assessments of decolonization in global health research. In *Frontiers in Education* 2024 Jun 4 (Vol. 9, p. 1233343). Frontiers Media SA.

### Day 2

#### Session 2.1

- **Halpaap BM**, **Tucker JD**, Mathanga D, Juban N, Awor P, Saravia NG, Han L, de Villiers K, Kitamura M, Cuervo LG, Peeling R, Reeder JC. Social innovation in global health: sparking

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Link: [https://www.thelancet.com/journals/langlo/article/PIIS2214-109X\(20\)30070-X/fulltext](https://www.thelancet.com/journals/langlo/article/PIIS2214-109X(20)30070-X/fulltext)

- **Byrne M**, Tan RKJ, Wu D, Marley G, Hlatshwako TG, Tao Y, Bissram J, Nachman S, Tang W, Ramaswamy R, **Tucker** JD. Prosocial Interventions and Health Outcomes: A Systematic Review and Meta-Analysis. *JAMA Netw Open*. 2023 Dec 1;6(12):e2346789. doi: 10.1001/jamanetworkopen.2023.46789. PMID: 38064214; PMCID: PMC10709779. Link: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10709779/>
- **Grol, R.** & Wensing, M. Selection of strategies for improving patient care. In: Wensing, R. Grol, & J. Grimshaw (Eds.). *Improving Patient Care: The Implementation of Change in Health Care 3<sup>rd</sup> ed.* Wiley-Blackwell; 2020. p.191-206. <https://doi.org/10.1002/9781119488620.ch10>
- Powell, B.J., Waltz, T.J., Chinman, M.J., Damschroder, L.J., Smith, J.L., Matthieu, M.M., Proctor, E.K, & Kircher, J.E. A refined compilation of implementation strategies: results from the Expert recommendations for Implementing Change (ERIC) project. *Implementation Science*. 2015; 10(1), 21. <https://doi.org/10.1186/s13012-015-0209-1>
- Proctor, E.K., Powell, B.J., & McMillen, J.C. Implementation Strategies: Recommendations for specifying and reporting. *Implementation Science*, 2013 Dec; 8(1):139. <https://doi.org/10.1186/1748-5908-8-139>
  - *This paper is essential for understanding the foundational conceptualizations of implementation strategies.*
- Proctor, E.K., Bunker, A.C., Lengnick-Hall, R., Gerke, D.R., Martin, J.K., Phillips, R.J., and Swason, J.C. Ten Years of Implementation Outcomes Research: A Scoping Review. *Implementation Science*, 2023; 18:31 <https://doi.org/10.1186/s13012-023-01286-z>
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- Kirchner J. E., Waltz J. T., Powell B. J., Woodard J.L., & Proctor, E. K. Implementation Strategies. In R.C. Brownson, G.A Colditz, & E.K Proctor (Eds.). *Dissemination and implementation research in health: Translating science to practice to Practice.* Oxford University Press; 2023. p.119-146. <https://doi.org/10.1093/oso/9780190683214.003.0015>
- Fernandez ME, Ten Hoor GA, Van Lieshout S, Rodriguez SA, Beidas RS, Parcel G, Ruiters RA, Markham CM, Kok G. Implementation mapping: using intervention mapping to develop implementation strategies. *Frontiers in public health*. 2019 Jun 18;7:158.

## Session 2.2

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- Beres LK, Simbeza S, Holmes CB, Mwamba C, Mukamba N, Sharma A, Munamunungu V, Mwachande. M., et al. Human-Centered Design Lessons for Implementation Science: Improving the Implementation of a Patient-Centered Care Intervention. *J Acquir Immune Defic Syndr*. 2019 Dec; 82 Suppl 3(3):S230-S243. PMID: 31764259; PMCID: PMC6880397.
- Dopp AR, Parisi KE, Munson SA, Lyon AR. Aligning implementation and user-centered design strategies to enhance the impact of health services: results from a concept mapping study. *Implementation Science Communications*. 2020 Dec;1(1):1-3.
- McHugh SM, Riordan F, Curran GM, Lewis CC, Wolfenden L, Presseau J, Lengnick-Hall R, Powell BJ. Conceptual tensions and practical trade-offs in tailoring implementation interventions. *Front Health Serv*. 2022 Nov 17;2:974095. PMID: 36925816; PMCID: PMC10012756.
- Zanolini A, Sikombe K, Sikazwe I, Eshun-Wilson I, Somwe P, Bolton Moore C, Topp SM, Czaicki N, Beres LK, Mwamba CP, Padian N, Holmes CB, Geng EH. Understanding preferences for HIV care and treatment in Zambia: Evidence from a discrete choice experiment among patients who have been lost to follow-up. *PLoS Med*. 2018 Aug 13;15(8):e1002636. PMID: 30102693; PMCID: PMC6089406.
  - *The applied paper illustrates of how preference methods can offer insights distinct from those typically gained from other qualitative and quantitative methods, using analyses such as "willingness to trade."*
- Eshun-Wilson I, Kim HY, Schwartz S, Conte M, Glidden DV, Geng EH. Exploring Relative Preferences for HIV Service Features Using Discrete Choice Experiments: a Synthetic Review. *Curr HIV/AIDS Rep*. 2020 Oct;17(5):467-477. PMID: 32860150; PMCID: PMC7497362.
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- Valente TW. Network interventions. *Science*. 2012 Jul 6;337(6090):49-53.
- Tang W, Ritchwood TD, Wu D, Ong JJ, Wei C, Iwelunmor J, Tucker JD. Crowdsourcing to improve HIV and sexual health outcomes: a scoping review. *Current HIV/AIDS Reports*. 2019 Aug 15;16:270-8.
- Tang W, Wei C, Cao B, Wu D, Li KT, Lu H, Ma W, Kang D, Li H, Liao M, Mollan KR. Crowdsourcing to expand HIV testing among men who have sex with men in China: a closed cohort stepped wedge cluster randomized controlled trial. *PLoS medicine*. 2018 Aug 28;15(8):e1002645.
- Tang, Weiming, et al. "Crowdsourcing health communication about condom use in men who have sex with men in China: a randomised controlled trial." *The Lancet*. 2016; S73 388.

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- McHugh SM, Riordan F, Curran GM, Lewis CC, Wolfenden L, Presseau J, Lengnick-Hall R, Powell BJ. Conceptual tensions and practical trade-offs in tailoring implementation interventions. *Frontiers in Health Services*. 2022 Nov 17;2:974095.
- Riordan F, Kerins C, Pallin N, Albers B, Clack L, Morrissey E, Curran GM, Lewis CC, Powell BJ, Presseau J, Wolfenden L. Characterising processes and outcomes of tailoring implementation strategies in healthcare: a protocol for a scoping review. *HRB Open Research*. 2022 Sep 20;5(17):17.
- Waltz TJ, Powell BJ, Fernández ME, Abadie B, Damschroder LJ. Choosing implementation strategies to address contextual barriers: diversity in recommendations and future directions. *Implementation science*. 2019 Dec;14(1):1-5.
- Hallsworth M, Chadborn T, Sallis A, Sanders M, Berry D, Greaves F, Clements L, Davies SC. Provision of social norm feedback to high prescribers of antibiotics in general practice: a pragmatic national randomised controlled trial. *The Lancet*. 2016 Apr 23;387(10029):1743-52.
  - *A great example of an alternative theoretical approach to that diverges from the usual training and/or audit and feedback approaches; demonstrates how behavioral insights and implementation science can impact practice at scale.*
- de Walque D. The use of financial incentives to prevent unhealthy behaviors: A review. *Social Science & Medicine*. 2020 Jul 27; 113236.
- Downs JA, Mwakisole AH, Chandika AB, Lugoba S, Kassim R, Laizer E, Magambo KA, Lee MH, Kalluvya SE, Downs DJ, Fitzgerald DW. Educating religious leaders to promote uptake of male circumcision in Tanzania: a cluster randomised trial. *The Lancet*. 2017 Mar 18;389(10074):1124-32.

### Day 3

- McKay VR, Morshed AB, Brownson RC, Proctor EK, Prusaczyk B. Letting go: Conceptualizing intervention de-implementation in public health and social service settings. *American Journal of Community Psychology*. 2018 Sep;62(1-2):189-202.
- Sekhon, M., Cartwright, M. & Francis, J.J. Acceptability of healthcare interventions: an overview of reviews and development of a theoretical framework. *BMC Health Serv Res*. 2017; 17 88. <https://doi.org/10.1186/s12913-017-2031-8>

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- Weiner BJ, Lewis CC, Stanick C, et al. Psychometric assessment of three newly developed implementation outcome measures. *Implement Sci.* 2017;12(1):108. Published 2017 Aug 29. doi:10.1186/s13012-017-0635-3
- Valentijn PP, Schepman SM, Opheij W, Bruijnzeels MA. Understanding integrated care: a comprehensive conceptual framework based on the integrative functions of primary care. *Int J Integr Care.* March 2013;13:e010. doi:10.5334/ijic.886
- Copas, A. J., Lewis, J. J., Thompson, J. A., Davey, C., Baio, G., & Hargreaves, J. R. Designing a stepped wedge trial: three main designs, carry-over effects and randomisation approaches. *Trials.* 2015;16(1), 1-12.
- Westreich D, Edwards JK, Lesko CR, Cole SR, Stuart EA. Target Validity and the Hierarchy of Study Designs. *Am J Epidemiol.* 2019 Feb 1;188(2):438-443. PMID: 30299451; PMCID: PMC6357801.
- Loudon K, Treweek S, Sullivan F, Donnan P, Thorpe KE, Zwarenstein M. The PRECIS-2 tool: designing trials that are fit for purpose. *bmj.* 2015 May 8;350.
- Ridde, V., Pérez, D., & Robert, E. Using Implementation Science Theories and Frameworks in Global Health. *BMJ global health.* 2020; 5(4). <https://gh.bmj.com/content/5/4/e002269>
- Ware, N.C. Qualitative contributions to implementation research on HIV prevention and treatment. *JAIDS Journal of Acquired Immune Deficiency Syndromes.* 2019; 1(82), 217-221. <https://doi.org/10.1097/qai.0000000000002214>
- Meza RD, Moreland JC, Pullmann MD, Klasnja P, Lewis CC, Weiner BJ. Theorizing is for everybody: Advancing the process of theorizing in implementation science. *Frontiers in Health Services.* 2023 Mar 10;3:1134931.
- Chambers DA, Glasgow RE, Stange KC. The dynamic sustainability framework: addressing the paradox of sustainment amid ongoing change. *Implementation science.* 2013 Dec;8(1):1-1.
- Greenhalgh. T., Robert, G., Macfarlane, F., Bate, P., & Kyriakidou, O. Diffusion of innovations in service organizations: Systematic review and recommendations. *The Milbank quarterly.* 2004; 82(4), 581-629. <https://doi.org/10.1111/j.0887-378X.2004.00325.x>
- Kilbourne A, Chinman M, Rogal S, Almirall D. Adaptive designs in implementation science and practice: their promise and the need for greater understanding and improved communication. *Annual Review of Public Health.* 2024;45.
- Curran GM, Landes SJ, McBain SA, Pyne JM, Smith JD, Fernandez ME, Chambers DA, Mittman BS. Reflections on 10 years of effectiveness-implementation hybrid studies. *Frontiers in Health Services.* 2022 Dec 8;2:1053496.



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- Fortney JC, Curran GM, Lyon AR, Check DK, Flum DR. Similarities and Differences Between Pragmatic Trials and Hybrid Effectiveness-Implementation Trials. *Journal of General Internal Medicine*. 2024 Apr 16:1-9.
- Knox, J., Schwartz, S., Duncan, D. T., Curran, G., Schneider, J., Stephenson, R., ... & Geng, E. (2023). Proposing the observational–implementation hybrid approach: designing observational research for rapid translation. *Annals of epidemiology*, 85, 45-50. <https://doi.org/10.3389/fpubh.2019.00158>

### Session 3.2

- Fernandez, M.E., Ten Hoor, G.A., van Lieshou, S., Rodriguez, S.A., Beidas, R.S., Parcel, G., Ruiter, R.A., Markham, C.M., & Kok, G. Implementation mapping: Using intervention mapping to develop implementation strategies. *Frontiers in Public Health*, 2019; 18(7), 158. <https://doi.org/10.3389/fpubh.2019.00158>
- Leeman, J., Birken, S.A., Powell, B.J., Rohweder, C., & Shea, C.M. Beyond “Implementation Strategies”: classifying the full range of strategies used in implementation science and practice. *Implementation Science*, 2017; 12(125). <https://doi.org/10.1186/s13012-017-0657-x>
- Grol, R. & Wensing, M. Effective implementation of change in healthcare: a systematic approach. In Wensing, R. Grol, & J. Grimshaw (Eds.), *Improving Patient Care: The Implementation of Change in Health Care*. John Wiley & Sons, Incorporated; 2020 p. 40-63. <https://doi.org/10.1002/9781119488620.ch3>
- Ciapponi A, Lewin S, Herrera CA, Opiyo N, Pantoja T, Paulsen E, Rada G, Wiysonge CS, Bastias G, Dudley L, Flottorp S. Delivery arrangements for health systems in low-income countries: an overview of systematic reviews. *Cochrane Database of Systematic Reviews*. 2017;(9).
- Flottorp, S.A., Oxman, A.D., Krause, J., Musila, N.R., Wensing, M., Godycki-Cwirko, M., Baker, R., & Eccles, M.P. A checklist for identifying determinants of practice: A systematic review and synthesis of frameworks and taxonomies of factors that prevent or enable improvements in healthcare professional practice. *Implementation Science*. 2013; 8(35). <https://doi.org/10.1186/1748-5908-8-35>
- Sundararajan R, Ponticiello M, Lee MH, et al. Traditional healer-delivered point-of-care HIV testing versus referral to clinical facilities for adults of unknown serostatus in rural Uganda: a mixed-methods, cluster-randomised trial. *Lancet Glob Health*. 2021;9(11):
- Powell BJ, Fernandez ME, Williams NJ, Aarons GA, Beidas RS, Lewis CC, McHugh SM, Weiner BJ. Enhancing the Impact of Implementation Strategies in Healthcare: A Research Agenda. *Front Public Health*. 2019 Jan 22; 7:3. PMID: 30723713; PMCID: PMC6350272.

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- Smith SN, Almirall D, Choi SY, Koschmann E, Rusch A, Bilek E, Lane A, Abelson JL, Eisenberg D, Himle JA, Fitzgerald KD. Primary aim results of a clustered SMART for developing a school-level, adaptive implementation strategy to support CBT delivery at high schools in Michigan. *Implementation Science*. 2022 Dec;17(1):1-9.
- Geng EH, Odeny TA, Montoya LM, Iguna S, Kulzer JL, Adhiambo HF, Eshun-Wilson I, Akama E, Nyandieka E, Guzé MA, Shade S. Adaptive strategies for retention in care among persons living with HIV. *NEJM Evidence*. 2023 Mar 28;2(4):EVIDo2200076.
- Lei H, Nahum-Shani I, Lynch K, Oslin D, Murphy SA. A "SMART" design for building individualized treatment sequences. *Annu Rev Clin Psychol*. 2012;8:21-48. PMID: 22224838; PMCID: PMC3887122.
- Quanbeck A, Almirall D, Jacobson N, Brown RT, Landeck JK, Madden L, Cohen A, Deyo BMF, Robinson J, Johnson RA, Schumacher N. The Balanced Opioid Initiative: protocol for a clustered, sequential, multiple-assignment randomized trial to construct an adaptive implementation strategy to improve guideline-concordant opioid prescribing in primary care. *Implement Sci*. 2020 Apr 25;15(1):26. doi: 10.1186/s13012-020-00990-4.
- Lewis CC, Klasnja P, Lyon AR, Powell BJ, Lengnick-Hall R, Buchanan G, Meza RD, Chan MC, Boynton MH, Weiner BJ. The mechanics of implementation strategies and measures: advancing the study of implementation mechanisms. *Implementation Science Communications*. 2022 Dec;3(1):1-1.
- Williams, M.J. External validity and policy adaptation: a five-step guide to mechanism mapping. University of Oxford. 2017 <https://api.semanticscholar.org/CorpusID:36932853>
- Lewis, C. C., Klasnja, P., Powell, B. J., Lyon, A. R., Tuzzio, L., Jones, S., et al. From classification to causality: advancing understanding of mechanisms of change in implementation science. *Frontiers in public health*. 2018;6 p.136.
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  - *This paper highlights many of the real challenges with implementation science. It studies an implementation problem but doesn't use or test an implementation strategy, thereby illustrating lost opportunities in learning about implementation.*
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  - *Many of our discussions in global health and implementation science revolve around justice. This piece draws attention to several key concepts widely discussed in philosophy but rarely in applied sciences, with implications for conducting implementation science in a global context and beyond.*
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### Optional Module: Ethics

#### International ethics guidelines

- Weijer C, Grimshaw JM, Eccles MP, McRae AD, White A, Brehaut JC, Taljaard M and the Ottawa Ethics of Cluster Randomized Trials Consensus Group. The Ottawa Statement on the Ethical Design and Conduct of Cluster Randomized Trials. *PLoS Medicine* 2012; 9(11): e1001346. [9 pages]

#### Précis/summary guidelines document

- Taljaard M, Weijer C, Grimshaw JM, Eccles MP and the Ottawa Ethics of Cluster Randomized Trials Consensus Group. The Ottawa Statement on the Ethical Design and Conduct of Cluster Randomised Trials: A précis for researchers and research ethics committees. *British Medical Journal* 2013; 346: f2838.

#### Ethical analysis (background papers underlying the *Ottawa Statement* guidelines)

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#### Justifying the use of CRT designs

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- Goldstein CE, Giraudeau B, Weijer C, Taljaard M. When and how should we cluster and cross over: methodological and ethical issues. *Canadian Journal of Anesthesia* 2018; 65(7): 760-765.
- Binik A. Delaying and withholding interventions: ethics and the stepped wedge trial. *Journal of Medical Ethics* 2019; 45: 662-667.

### Research ethics committee review

- Weijer C, Taljaard M. Ottawa Statement does not impede randomised evaluation of government health programmes. *J Med Ethics* 2020; 46(1): 31-33.

### Obtaining informed consent

- Nix HP, Weijer C, Brehaut JC, Forster D, Goldstein CE, Taljaard M. Informed consent in cluster randomised trials: a guide for the perplexed. *BMJ Open* 2021; 11(9): e054213.

### Assessing benefits and harms

- Hey SP, Weijer C, Taljaard M, Kesselheim AS. Research ethics for emerging trial designs: does equipoise need to adapt? *BMJ* 2018; 360: k226.

### Protecting vulnerable participants

- Nix HP, Largent EA, Taljaard M, Mitchell SL, Weijer C. Ethical analysis of vulnerabilities in cluster randomized trials involving people living with dementia in long-term care homes. *JAGS: Journal of the American Geriatric Society* 2023; 71(2): 588-598.

### How to apply the *Ottawa Statement* recommendations in specific settings

- Goldstein CE, Taljaard M, Nicholls SG, Beaucage M, Brehaut J, Cook CL, Cote BB, Craig JC, Dixon SN, Du Toit J, Du Val CCS, Garg AX, Grimshaw JM, Kalatharan S, Kim SYH, Kinsella A, Luyckx V, Weijer C. The Ottawa Statement implementation guidance document for cluster randomized trials in the hemodialysis setting. *Kidney International* 2024 May; 105(5): 898–911.