

 **Tool 5.1/5.2: SOLUTION BUILDING SAMPLE & WORKSHEET**

**Section in Planner: Phase 2, Step 5 (5.1)**

**Why is this important?**

This is the “*exactly what will it take to get it done”* step. The more tailored your strategies and tactics are for each barrier, the greater the likelihood of program success.

**How to use this tool:**

In Step 4, the planning team identified barriers and drivers to program implementation and prioritized those issues that needed attention. Planners can use the same framework to tailor solutions aimed at program, program user and program setting challenges. Some issues will cross all categories. A sample approach is provided to address a commonly expressed concern about managing participant safety. Use this worksheet together with the master implementation plan to ensure activities are assigned and completed.

Remember to consider any unique resources within your community; solution building includes both responding to challenges and leveraging community assets.

Use and adapt this worksheet to suit your own setting and circumstances, as needed. This tool was developed in response to study participant input. We welcome any feedback.

**User Comments:**

This tool was developed in response to study participant input. We welcome any feedback.

*"We wanted to make sure that our solutions were acceptable to people living with stroke and caregivers. Our planning team first used the barrier assessments in the Planner and identified a couple of items that we needed to action, which was good. My next step was to then have a nice one-on-one open conversation with our team's stroke advisor and caregiver about what they see as potential barriers and to learn about their ideas for solutions."* (Physiotherapist)

|  |
| --- |
| Phase 2, Step 5: Solution Building Worksheet |
| Review the implementation barriers (challenges) and drivers (assets) identified in your assessment of factors associated with the exercise PROGRAM, the Program USERS and the Program SETTING. Enter those issues you identified as having the greatest influence on successful program implementation (e.g. Top 5 priorities or as many as you determine require attention). Develop SolutioNS/ACTION PLANS for each issue identified.  |
| BARRIER(s) | **IMPLEMENTATION STRATEGY****ACTION(s) REQUIRED**  | **ASSIGNED TO** | **DATE** | **DECISIONS/ACTIONS**  |
| 1 | *Identified Barrier:***(Example) Participant Safety** *Priority:* **High***Description of issue:** Participant and family concerns re: ability to participate safely in a community-based class
* Fitness Instructor concerns re: confidence/comfort level to deliver program; anxiety re: how to manage adverse events, e.g. falls, medications; how to adapt program; how to safely supervise group
* Physiotherapist/program developer concerns re: instructor level knowledge and skill; ability to adapt program regimen effectively and safely, maintain program fidelity
* Provider Agency concerns re: safety and supervision of participants, institutional liabilities, confidentiality of participant health information
 | *Approach to Solution Building:** Start by outlining specific stakeholder concerns, i.e. exactly who is concerned about exactly what? *(see example description, left)*
* Revisit your community and program assessments, e.g. your community scan, review of programs, feasibility assessment, identification and working agreements with partners, the business case, etc. You’ve already gathered most of the information you need to develop a strategy. And you may have already dealt with many of the noted challenges in your implementation planning decisions to date.
* Consider this information now as it relates specifically to patient safety and focus your action plan on outstanding issues. See questions below.
* Review the selected program/instructor training materials and certification requirements. How are the issues of concern addressed in the required training of instructors?
* Contact the exercise program developer(s) to inquire about their experience in developing, delivering, and supporting the selected program, what to anticipate, and how other sites have addressed potential safety issues.
* Locate and contact colleagues delivering similar programs to share best practices. What is their experience; how are they managing these (common) implementation challenges?
* Review best practice guidelines for information on participant supervision and safety.

*Consider:*1. What is the eligibility criteria for enrolment in the selected program: is your registration process clearly defined, understood, and shared by all stakeholders (e.g. participants and/or their referring health partner; instructors, program managers?). Are there exceptions – who will make these decisions, using what criteria?2. Is medical authorization or a waiver required for participation? Who/how/when will this be managed? What information is needed re: e.g. medical conditions, medications (e.g. do participants know how and when to use their medications; are they required to bring any medication to class?) How will this information be shared, used, and where will it be kept? Are safeguards in place to keep this information confidential?3. What is the participant screening process: who is qualified to conduct these assessments – how/when/where will screening occur?4. What is the role of volunteers/caregivers who may attend with participant? Do they also require training? How will this be managed? Is your volunteer onboarding process appropriate or does it need to be modified for this program?5. Will participant progress be monitored, evaluated, and documented; at what intervals? Where will those records be kept? Should instructors conduct an individual check-in at beginning of each class? If a participant reports a fall, is it safe to return to class; is a change to their exercise regimen required? What is the level of engagement with referring health partner(s)? Who will you call for advice?6. What instructor training/certification is required to deliver the program, specifically the management of anticipated safety concerns? Is program-specific training provided? Does this training meet or exceed any existing provincial or agency requirements/mandates? Who provides the training? Can you conduct a trial class prior to launch? 7. Are you able to meet the recommended 1:4 instructor/staff to participant ratio? How stable/consistent is your staffing complement? What are the plans for refresher training and ongoing level of support to fitness instructors; are resources sufficient to meet associated staffing and training costs?8. What emergency procedures, equipment and first aid training have been established at the provider agency? Are safety drills and refresher training routinely conducted?9. How will ongoing communication be managed between key stakeholders, e.g. referring health partners, advisory/program specialists?10. How will program outcomes be evaluated – are clearly defined measurement strategies in place; procedures for adverse event reporting? 11. What are your criteria for stopping or sustaining the program? 12. What policies are in place in the provider agency with respect to medical-legal liability, insurance, etc. |  |  |  |
|  | **BARRIER(s)** | **IMPLEMENTATION STRATEGy/ACTION(s) REQUIRED**  | **ASSIGNED TO** | **DATE** | **DECISIONS/ACTIONS**  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |
|  | **DRIVER (s)** | **IMPLEMENTATION STRATEGy/ACTION(s) REQUIRED**  | **ASSIGNED TO** | **DATE** | **DECISIONS/ACTIONS**  |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |