[Inner Setting] Memo Template

Introduction

This document facilitates aggregating, summarizing, and rating data for each construct at the Inner Setting (i.e., unit of analysis) level.

Note: If conducting rapid qualitative analysis, data is aggregated during coding in the CFIR Construct x Inner Setting Matrix Template via a building approach as interviews progress. See previous publication [1] *(Nevedal et al. 2021) and presentation* [2] *for more detail on completing rapid qualitative analysis using CFIR (and how it compares to the in-depth qualitative approach).*

Aggregating data facilitates summarizing and rating data for each construct; ratings are especially useful when there are at least three Inner Settings and there is interest in comparing constructs across Inner Settings based on implementation outcomes. Detailed rating guidelines are provided in the CFIR Construct Rating Guidelines. As with coding, we recommend using a consensus-based approach to finalize ratings. Depending on the project, it may not be helpful to rate the data, or users may wish to collapse ratings into a binary, e.g., barrier vs. facilitator, and only complete the valence (+ vs -) component of rating. See the CFIR User Guide or www.cfirguide.org for more information.

Note: This document is the first iteration of the Inner Setting Memo Template with updated CFIR constructs; please provide feedback regarding this template via www.cfirguide.org in order for us to improve it!

Instructions

Step	Primary Analyst:	Secondary Analyst
1	Read the data and memos for each construct and participant; use yellow highlight to emphasize data that is relevant to the construct being rated.	Read the data and memos for each construct and participant; use red text to emphasize additional data (as needed) that is relevant to the construct being rated.
2	Optional: Apply a rating at the participant level. *Note: Our team only uses these for discussion purposes and to determine the overall rating (and we do not come to consensus on these ratings).*	
3	Write a summary of the data across participants for each construct.	Review the summary and revise as necessary using red text or track changes.
4	Apply a rating at the construct-level (based on the CFIR Construct Ratings Guidelines) and write a rationale for the rating.	Apply a rating at the construct-level (based on the CFIR Construct Ratings Guidelines) and review (and revise as necessary) the rationale for the rating.
5	Resolve differences and finalize summaries and overall ratings via consensus discussion.	

Analysts	Participants
Primary: [Primary Analyst Name] Secondary: [Secondary Analyst Name]	Participant [ID Number]: Role Participant [ID Number]: Role Participant [ID Number]: Role

Inner Setting Summary

[Draft high-level summary of the Inner Setting]

Innovation Domain

Innovation Source

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

[Draft summary of data at Inner Setting Level, a summary of the data from all of the participants]

Rationale:

[Draft rationale for overall rating]

Data:

Participant [ID Number] (Primary Analyst: __; Secondary Analyst: __)

[Copy coded data from Participant [ID Number]]

Participant [ID Number] (Primary Analyst: __; Secondary Analyst: __)

[Copy coded data from Participant [ID Number]]

Participant [ID Number] (Primary Analyst: __; Secondary Analyst: __)

[Copy coded data from Participant [ID Number]]

Participant [ID Number] (Primary Analyst: __; Secondary Analyst: __)

[Copy coded data from Participant [ID Number]]

Innovation Evidence-Base

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Relative Advantage

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Adaptability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Trialability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Complexity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Design

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Cost

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Outer Setting Domain

Critical Incidents

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Local Attitudes

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Local Conditions

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Partnerships & Connections

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Policies & Laws

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Financing

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

External Pressure

Societal Pressure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Market Pressure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Performance-Measurement Pressure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Inner Setting Domain

Structural Characteristics

Physical Infrastructure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Information Technology Infrastructure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Work Infrastructure

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Relational Connections

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Communications

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Culture

Human Equality-Centeredness

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Recipient-Centeredness

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Deliverer-Centeredness

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Learning-Centeredness

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Tension for Change

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Compatibility

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Relative Priority

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Incentive Systems

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Mission Alignment

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Available Resources

Funding

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Space

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Materials & Equipment

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Access to Knowledge & Information

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Individuals: Roles & Characteristics

High-level Leaders

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Mid-level Leaders

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opinion Leaders

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Implementation Facilitators

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Implementation Leads

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Implementation Team Members

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Other Implementation Support

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Deliverers

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Recipients

Need

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Capability

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Opportunity

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Motivation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Implementation Process

Teaming

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Assessing Needs

Innovation Deliverers

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Recipients

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Assessing Context

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Planning

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Tailoring Strategies

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Engaging

Innovation Deliverers

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation Recipients

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Doing

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Reflecting & Evaluating

Implementation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Innovation

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

Adapting

Overall Rating: __ (Primary Analyst: __; Secondary Analyst: __)

Summary:

Rationale:

Data:

References

[1] A. L. Nevedal *et al.*, "Rapid versus traditional qualitative analysis using the Consolidated Framework for Implementation Research (CFIR)," *Implement. Sci.*, vol. 16, no. 1, p. 67, Jul. 2021, doi: 10.1186/s13012-021-01111-5.

[2] C. M. Reardon and A. L. Nevedal, "Rapid Analysis Using the Consolidated Framework for Implementation Research (CFIR): A Methods Cyberseminar," HSR&D Cyberseminars, Oct. 14, 2021. Accessed: Mar. 03, 2024. [Online]. Available: https://www.hsrd.research.va.gov/for_researchers/cyber_seminars/archives/video_archive.cfm?SessionID=4044&Seriesid=113