

# Knowledge Translation Planning Template©



Scientist  
Knowledge  
Translation  
Training™



Knowledge  
Translation  
Professional  
Certificate™

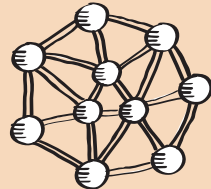
**INSTRUCTIONS:** This template was designed to assist with the development of Knowledge Translation (KT) plans for research but can be used to plan for non-research projects. The Knowledge Translation Planning Template is universally applicable to areas beyond health. Begin with box #1 and work through to box #13 to address the essential components of the KT planning process.

## (1) Project Partners



- ☐ researchers
- ☐ consumers - patients/families
- ☐ the public
- ☐ decision makers
- ☐ private sector/industry
- ☐ research funding body
- ☐ volunteer health sector/NGO
- ☐ practioners
- ☐ other

## (2) Degree of Partner Engagement



- ☐ from idea formulation straight through
- ☐ after idea formulation & straight through
- ☐ at point of dissemination & project end
- ☐ beyond the project

**Consider:** Not all partners will be engaged at the same point in time. Some will be collaborators, end users or audiences, or people hired to do specific activities.

## (3) Partner(s) Roles



*(1) What do the partner(s) bring to the project?*

*(2) How will partner(s) assist with developing, implementing or evaluating the KT plan?*

**Action:** Capture their specific roles in letters of support to funders, if requested.



## (4) KT Expertise on Team



- ☐ scientist(s) with KT expertise
- ☐ consultant with KT expertise
- ☐ knowledge broker/specialist
- ☐ KT supports within the organization(s)
- ☐ KT supports within partner organization(s)
- ☐ KT supports hired for specific task(s)



## (5) Knowledge Users (KUs)



Which KUs or audiences will you target?

- ☐ researchers
- ☐ health practitioners or service providers
- ☐ public
- ☐ media
- ☐ patients/consumers
- ☐ decision makers
  - ☐ in organization
  - ☐ in community
- ☐ policy makers
- ☐ private sector/industry
- ☐ research funders
- ☐ venture capitalists
- ☐ volunteer health sector/NGO
- ☐ other: specify ► \_\_\_\_\_

**Consider:** Have you included any of your audiences on your research team? If so, who and why (be strategic)?

## (6) Main Messages



What did you learn, or what do you anticipate learning?

What messages do you anticipate sharing (up to 3 KU audiences can be included on this form)?

Audience 1

Audience 2

Audience 3

OR

☐ No idea yet; messages will emerge during research through collaboration with partners.

**Consider:** What can you feasibly do within this project, given time and resources? Aim for defining your Single Most Important Thing (SMIT) or Bottom Line Actionable Message (BLAM).

## (7) KT Goals



What are your KT Goals for each KU/audience?

Audiences

1 2 3

↓ ↓ ↓

- Generate...**
- ☐ awareness
  - ☐ interest
  - ☐ practice change
  - ☐ behaviour change
  - ☐ policy action

- Impart...**
- ☐ knowledge
  - ☐ tools

- Inform...**
- ☐ research
  - ☐ product
  - ☐ patent

☐ other ► \_\_\_\_\_

**Consider:** KT is applicable to all research; even single studies are shared via journal articles. However, intent to change practice, behaviour or policy must be supported by a body of high quality research evidence (synthesis). Always consider legal and ethical principles in your KT efforts.

## (8) KT Strategy(s)



What KT strategy(s) will you use?

Audiences

1 2 3

↓ ↓ ↓

- Mostly Effective<sup>1</sup>**
- ☐ interactive small group
  - ☐ educational outreach
  - ☐ reminders
  - ☐ IT decision support
  - ☐ multi-prof collaboration
  - ☐ mass media campaign
  - ☐ financial incentive
  - ☐ combined interventions

- Mixed Effects<sup>1</sup>**
- ☐ conferences (didactic)
  - ☐ opinion leaders
  - ☐ champions
  - ☐ educational materials
  - ☐ patient-mediated interview
  - ☐ performance feedback
  - ☐ substitution of tasks
  - ☐ peer reviewed publication

- Limited Effects<sup>1</sup>**
- ☐ CQI - Continuous Quality Improvement

- Effects Unsupported by Synthesis<sup>2</sup>**
- ☐ press release
  - ☐ patent license
  - ☐ arts-based KT
  - ☐ social media
  - ☐ networks
  - ☐ communities of practice
  - ☐ Café Scientifique
  - ☐ webinar
  - ☐ other ► \_\_\_\_\_

**Consider:** Multifaceted/combined KT strategies are more effective than single strategies.

**NOTES**

## (9) KT Process



### When will KT occur?

- ☐ integrated iKT<sup>3</sup> – researchers and research users will collaborate to shape the research process, e.g., setting the research questions, deciding the methodology, involvement in data collection and tools development, interpretation of findings and dissemination of research results
- ☐ end of grant KT<sup>3</sup> – KT undertaken at the completion of the research process
- ☐ both

Comment on the specifics of your KT procedures; describe how you are using iKT:



## (10) KT Impact & Evaluation



### (a) Where do you want to have an impact?

- ☐ healthcare/well-being outcomes
- ☐ (clinical) practice
- ☐ policies/systems
- ☐ research & knowledge

### (b) How will you know if you achieved your KT goal(s)? Consider:

- ☐ reach indicators (*# distributed, # requested, # downloads/hits, media exposure*)<sup>4</sup>
- ☐ usefulness indicators (*read/browsed, satisfied with, usefulness of, gained knowledge, changed views*)<sup>4</sup>
- ☐ use indicators (*# intend to use, # adapting the information, # using to inform policy/advocacy/enhance programs, training, education, or research, # using to improve practice or performance*)<sup>4</sup>
- ☐ partnership/collaboration indicators (*# products/services developed or disseminated with partners, # or type capacity building efforts, social network growth, influences, collaborativeness*)<sup>4</sup>
- ☐ practice change indicators (*intent or commitment to change, observed change, reported change*)
- ☐ program or service indicators (*outcome data, documentation, feedback, process measures*)
- ☐ policy indicators (*documentation, feedback, process measures*)
- ☐ knowledge change (*quantitative & qualitative measures*)
- ☐ attitude change (*quantitative & qualitative measures*)
- ☐ systems change (*quantitative & qualitative measures*)

### (c) Guiding Questions for Evaluation<sup>5</sup>

- 1) What internal/external factors do you need to consider? Where is the energy for this work? How have similar initiatives been evaluated in the past? (*link this to partners, KUs*)
- 2) Who values the evaluation of this initiative? What are they saying they need from this evaluation? (*link this to partners, KUs*)
- 3) Why are you evaluating? For program growth or improvement; accountability? Sustainability? Knowledge generation? (e.g., *to know if the KT strategy met the objectives*)
- 4) How will literature or existing theories inform how you evaluate the initiative?
- 5) Which questions/objectives are critical? (*link this to KT goals, process, impact*)
- 6) Will you focus on process or outcome information? What are your pre-determined outcomes? How will you capture emergent outcomes?  
Does this information already exist in your system? (*link to methods, process, impact*)
- 7) Will methods be quantitative, qualitative or mixed? Do tools exist or will you need to create your own? (*link to KT methods*)
- 8) What perspective or skill set do you need to help you reach your evaluation objectives? (*link to partners, KUs*)
- 9) How do your stakeholders wish to receive this information so that it will be valuable and useful to them? How will you engage them throughout? (*link to partners, KUs*)

## (11) Resources

What resources are required?

- ☐ board
- ☐ financial
- ☐ human
- ☐ IT
- ☐ leadership
- ☐ management
- ☐ volunteer
- ☐ web
- ☐ worker
- ☐ other: (list)

►

**NOTES**

## (12) Budget Items

What budget items are related to the KT plan?

- |   |  |
|---|--|
| <input type="checkbox"/> accommodation              | <input type="checkbox"/> production/printing                   |
| <input type="checkbox"/> art installation           | <input type="checkbox"/> programming                           |
| <input type="checkbox"/> evaluation specialist      | <input type="checkbox"/> public relations                      |
| <input type="checkbox"/> graphics/imagery           | <input type="checkbox"/> reimbursements for partners           |
| <input type="checkbox"/> knowledge broker           | (e.g. time, parking, travel)                                   |
| <input type="checkbox"/> KT specialist              | <input type="checkbox"/> tech transfer/commercialization       |
| <input type="checkbox"/> mailing                    | <input type="checkbox"/> teleconferencing                      |
| <input type="checkbox"/> media release              | <input type="checkbox"/> travel: conferences                   |
| <input type="checkbox"/> media product (e.g. video) | <input type="checkbox"/> travel: meetings/educational purposes |
| <input type="checkbox"/> networking functions       | <input type="checkbox"/> web 2.0 (e.g. blogs, podcasts, wikis) |
| <input type="checkbox"/> open access journal        | <input type="checkbox"/> webinar services                      |
| <input type="checkbox"/> plain text writer          | <input type="checkbox"/> website development                   |
|   | <input type="checkbox"/> venue                                 |
|   | <input type="checkbox"/> other: (list)                         |

Estimated costs for items listed

►

►

**NOTE:** Be sure to include all KT costs in your budget for funders

## (13) Implementation

Describe how you will implement your KT strategy(s): What processes/procedures are involved? If practice or behaviour change is the focus, how will you ensure the knowledge (intervention) you are transferring retains quality, fidelity, sustainability?

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