

# Knowledge Translation Planning Template<sup>©</sup>



Specialist  
Knowledge  
Translation  
Training™



Specialist  
Knowledge  
Translation  
Training™  
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Translation  
Professional  
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**INSTRUCTIONS:** This template was designed to assist with the development of Knowledge Translation (KT) plans for research or non-research projects. It is universally applicable to health and other disciplines. Begin with box #1 and work through to box #13 to address the essential components of the KT planning process. Two e-learning modules are available for additional support <http://melaniebarwick.com/knowledge-translation-tools/>

## (1) Project Partners



**Who could benefit from this evidence?**

- ☐ Researchers
- ☐ Practitioners or service providers
- ☐ Public
- ☐ Media
- ☐ Patients/consumers
- ☐ Decision makers
- ☐ Policy makers/government
- ☐ Private sector/industry
- ☐ Research funders
- ☐ Volunteer health sector/NGO
- ☐ Other: specify  
    \_\_\_\_\_

## (2) Partner Engagement



**When will partner or knowledge user (KU) engagement happen?**

### Integrated KT

- ☐ From idea formulation straight through
- ☐ After idea formulation & straight through

### End of Grant

- ☐ At point of dissemination & project end
- ☐ Beyond the project

**Note:** Not all partners will be engaged to the same extent or at the same point in time. Some will be hired for specific activities.

## (3) Partner Roles



**What will partner(s) or KUs bring to the project? How will they assist with developing, implementing or evaluating the KT plan?**

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

## (4) KT Expertise



**Do you require KT expertise and how will this be accessed?**

- ☐ 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)

**Note:** If your KT involves *implementation* for practice or behaviour change, include an implementation specialist or scientist.

## Notes

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## (5) Knowledge Users (KUs)



**Who could benefit from this evidence?  
Which KU(s) or audiences will you target?**

- ☐ Researchers
- ☐ Practitioners or service providers
- ☐ Public
- ☐ Media
- ☐ Patients/consumers
- ☐ Decision makers
- ☐ Policy makers/government
- ☐ Private sector/industry
- ☐ Research funders
- ☐ Volunteer health sector/NGO
- ☐ Other: specify ► \_\_\_\_\_

**Note:** Have you included any KUs on your project team? If so, who and why? (*be strategic*)

## 6) Main Messages (MM)



**What is your overarching main message?**

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**What main messages** do you anticipate sharing for the **top 3 KU audiences?**

*KU1*

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*KU3*

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**OR**

- ☐ No idea yet; messages will emerge at end of grant and/or through collaboration with partners.

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

## (7) KT Goals



**What are the KT Goals for each KU audience?**

- ☐ ☐ ☐ Generate awareness, interest, buy-in
- ☐ ☐ ☐ Share knowledge
- ☐ ☐ ☐ Inform decision-making
- ☐ ☐ ☐ Inform research(ers)
- ☐ ☐ ☐ Facilitate policy change
- ☐ ☐ ☐ Facilitate practice or behavior change\*
- ☐ ☐ ☐ Commercialization/technology transfer
- ☐ ☐ ☐ Other ► \_\_\_\_\_

\* **Practice or behaviour change goals** require an **Implementation Plan** in addition to an overarching KT plan. Link here for support: <https://bit.ly/2rh0LZo>

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## (8) KT Strategies



**Which KT strategies will you use?** Consider your KT Goal(s) and select accordingly. KUs, MMs, KT Goals and KT strategies should align with each other.

### **Generate Awareness, Interest, Buy-In Share Knowledge, Inform Decision-Making**

Audiences

1 2 3  
↓ ↓ ↓

#### **Role-Based**

- ☐ ☐ ☐ - Knowledge Broker
- ☐ ☐ ☐ - Champion/opinions leader
- ☐ ☐ ☐ - Consultant
- ☐ ☐ ☐ - Leadership
- ☐ ☐ ☐ - Collaboration/partnership

#### **Educational**

- ☐ ☐ ☐ - Materials (guide, toolkit, pamphlet)
- ☐ ☐ ☐ - Plain language summary
- ☐ ☐ ☐ - Policy brief
- ☐ ☐ ☐ - Grey literature
- ☐ ☐ ☐ - Publication
- ☐ ☐ ☐ - Workshop, webinar
- ☐ ☐ ☐ - Conference
- ☐ ☐ ☐ - Professional development
- ☐ ☐ ☐ - In-service training
- ☐ ☐ ☐ - Network
- ☐ ☐ ☐ - Media
- ☐ ☐ ☐ - Social media

#### **Arts Based KT**

### **Inform Research**

Audiences

1 2 3  
↓ ↓ ↓

#### **Role Based**

- ☐ ☐ ☐ - Science collaboration
- ☐ ☐ ☐ - Network

#### **Educational**

- ☐ ☐ ☐ - Peer reviewed publication
- ☐ ☐ ☐ - Conference
- ☐ ☐ ☐ - Workshop
- ☐ ☐ ☐ - Synthesis document
- ☐ ☐ ☐ - Other document

#### **Technological**

- ☐ ☐ ☐ - Social media

### **Facilitate Practice or Behaviour Change**

**Note:** If your KT goal includes practice or behavior change you should begin with dissemination goals (share, inform) to set the stage and create buy in.

Follow with an **implementation plan** – see **The Implementation Game**<sup>1</sup> and worksheet  
<https://bit.ly/2rh0LZo>

### **Facilitate Policy Change**

Audiences

1 2 3  
↓ ↓ ↓

#### **Role Based**

- ☐ ☐ ☐ - Collaboration/partnership
- ☐ ☐ ☐ - Science policy fellowship, placement
- ☐ ☐ ☐ - Knowledge broker

#### **Educational** (also see far left column)

- ☐ ☐ ☐ - Peer reviewed publications
- ☐ ☐ ☐ - Grey literature
- ☐ ☐ ☐ - Meeting dialogue
- ☐ ☐ ☐ - Policy brief
- ☐ ☐ ☐ - Evidence brief/synthesis;
- ☐ ☐ ☐ - Stakeholder position paper
- ☐ ☐ ☐ - Rapid response synthesis

### **Commercialization / Technology Transfer**

- ☐ ☐ ☐ - Patent
- ☐ ☐ ☐ - Technology transfer/commercialization

**Note:** See the Technology Transfer Planning Template<sup>2</sup> here  
<https://bit.ly/2Gvp3ru>

## (9) KT Process



### When will KT occur?

- ☐ **Integrated KT<sup>3</sup>** Project team and knowledge users collaborate to shape the research process, e.g., setting research questions, deciding on methodology, recruiting and collecting data, interpreting findings and disseminating results.
- ☐ **End of grant KT<sup>3</sup>** KT is undertaken at the completion of the project.
- ☐ **Both**

**Note:** Describe how you will engage your KUs, particularly for integrated KT.

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## (10) KT Evaluation



### (A) How will you know your KT goals have been achieved?

- ☐ **Reach indicators<sup>4</sup>**  
*(# distributed, # requested, # downloads/hits, media exposure)*
- ☐ **Usefulness indicators<sup>4</sup>**  
*(read/browsed, satisfied with, usefulness of, gained knowledge, changed views)*
- ☐ **Use indicators<sup>4</sup>**  
*(# intend to use, # adapting the information, # using to inform policy or advocacy, enhance programs, training, education, or research, # using to improve practice or performance)*
- ☐ **Partnership/collaboration indicators<sup>4</sup>**  
*(# products developed or disseminated with partners, # or type of capacity building efforts, social network growth, influences, collaboration)*
- ☐ **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)*

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

- 1) Who values the evaluation of this KT plan? What are they saying they need from this evaluation? *(link this to partners, KUs)*
- 2) How have similar KT activities been evaluated in the past? *(link this to partners, KUs)*
- 3) Why are you evaluating? e.g., for program growth or improvement; accountability; sustainability; knowledge generation; research scholarship/publication, and/or to know if the KT strategy(ies) met the objectives
- 4) How does the KT and evaluation literature inform how you will evaluate your plan?
- 5) Will you focus on process or outcome information?
- 6) Will methods be quantitative, qualitative or mixed? Do tools exist or will you need to create your own? *(link to KT methods)*
- 7) What perspective or skill set do you need to help you reach your evaluation objectives? *(link to partners, KUs)*
- 8) How will you share evaluation findings with your stakeholders and knowledge users?

## (11) Resources



**What resources are needed to deliver on this KT plan?**

- ☐ Governing Board
- ☐ Financial
- ☐ Human IT
- ☐ Leadership
- ☐ Management
- ☐ Volunteer
- ☐ Web
- ☐ Worker
- ☐ Other:

## (12) Budget Items



**What budget items are needed for the KT plan?**

- |  |  |
|--|--|
| <input type="checkbox"/> Accommodation                       | <input type="checkbox"/> Public relations                                    |
| <input type="checkbox"/> Art installation or production      | <input type="checkbox"/> Reimbursement ( <i>e.g. time, parking, travel</i> ) |
| <input type="checkbox"/> Evaluation specialist               | <input type="checkbox"/> Technology transfer, commercialization              |
| <input type="checkbox"/> Graphics/visual design              | <input type="checkbox"/> Teleconferencing                                    |
| <input type="checkbox"/> Knowledge broker/specialist         | <input type="checkbox"/> Travel: conferences, meetings, educational purposes |
| <input type="checkbox"/> Postage costs                       | <input type="checkbox"/> Social media  |
| <input type="checkbox"/> Media release                       | <input type="checkbox"/> Webinar services                                    |
| <input type="checkbox"/> Media product ( <i>e.g. video</i> ) | <input type="checkbox"/> Website development                                 |
| <input type="checkbox"/> Networking function                 | <input type="checkbox"/> Venue   |
| <input type="checkbox"/> Open access journal publication     |  |
| <input type="checkbox"/> Writer                              |  |
| <input type="checkbox"/> Production/printing                 |  |
| <input type="checkbox"/> Other: _____                        |  |

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

## (13) Procedures



**Describe your KT procedures and methods.**

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To evaluate the quality of your KT plan, link to the **KT Plan Appraisal Tool** <sup>6</sup> here: <https://bit.ly/2HZUJrt>

### Sources:

- 1 Barwick M. (2018). *The Implementation Game*. Toronto, ON: The Hospital for Sick Children. <https://buff.ly/2QovKNE>
- 2 Center on Knowledge Translation for Technology Transfer. *Technology and Commercialization Planning Template*. Buffalo, NY: University at Buffalo. <https://bit.ly/2Gvp3ru>
- 3 CIHR <http://www.cihr-irsc.gc.ca/e/49505.html>
- 4 Sullivan, Strachan, & Timmons. *Guide to Monitoring and Evaluating Health Information Products and Services*. <https://www.k4health.org/sites/default/files/guide-to-monitoring-and-evaluating-health-information.pdf>
- 5 Parker, K (2013). *KT and Evaluation*. Knowledge Translation Professional Certificate. Toronto, ON: Learning Institute, Hospital for Sick Children. Barwick M. (2019). Unpublished.
- 6 Barwick M. (2019). *The Knowledge Translation Plan Appraisal Tool (KT-PAT)*. Toronto, ON: The Hospital for Sick Children. <http://melaniebarwick.com/knowledge-translation-tools/>

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