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.

<table>
<thead>
<tr>
<th>(1) Project Partners</th>
<th>(2) Degree of Partner Engagement</th>
<th>(3) Partner(s) Roles</th>
<th>(4) KT Expertise on Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>researchers</td>
<td>from idea formulation straight through</td>
<td>(1) What do the partner(s) bring to the project?</td>
<td>scientist(s) with KT expertise</td>
</tr>
<tr>
<td>consumers - patients/families</td>
<td>after idea formulation &amp; straight through</td>
<td>(2) How will partner(s) assist with developing, implementing or evaluating the KT plan?</td>
<td>consultant with KT expertise</td>
</tr>
<tr>
<td>the public</td>
<td>at point of dissemination &amp; project end</td>
<td>Action: Capture their specific roles in letters of support to funders, if requested.</td>
<td>knowledge broker/specialist</td>
</tr>
<tr>
<td>decision makers</td>
<td>beyond the project</td>
<td></td>
<td>KT supports within the organization(s)</td>
</tr>
<tr>
<td>private sector/industry</td>
<td>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.</td>
<td>KT supports within partner organization(s)</td>
<td></td>
</tr>
<tr>
<td>research funding body</td>
<td></td>
<td></td>
<td>KT supports hired for specific task(s)</td>
</tr>
<tr>
<td>volunteer health sector/NGO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>practitioners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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### (5) Knowledge Users (KUs)

**Which KUs or audiences will you target?**
- [ ] researchers
- [ ] health practitioners or service providers
- [ ] public
- [ ] media
- [ ] patients/consumers
- [ ] decision makers
- [ ] 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?**

### (7) KT Goals

**What are your KT Goals for each KU/audience?**

<table>
<thead>
<tr>
<th>Audiences</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate...</td>
<td>awareness</td>
<td>interest</td>
<td>practice change</td>
</tr>
<tr>
<td>Inform...</td>
<td>knowledge tools</td>
<td>behaviour change</td>
<td>policy action</td>
</tr>
<tr>
<td>Audience 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audience 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Audience 3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>No idea yet; messages will emerge during research through collaboration with partners.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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).

### (8) KT Strategy(s)

**What KT strategy(s) will you use?**

<table>
<thead>
<tr>
<th>Audiences</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mostly Effective¹</td>
<td>interactive small group</td>
<td>educational outreach</td>
<td>reminders</td>
</tr>
<tr>
<td>Mixed Effects¹</td>
<td>IT decision support</td>
<td>multi-prof collaboration</td>
<td>mass media campaign</td>
</tr>
<tr>
<td>Limited Effects¹</td>
<td>financial incentive</td>
<td>combined interventions</td>
<td></td>
</tr>
<tr>
<td>Effects Unsupported by Synthesis²</td>
<td>conferences (didactic)</td>
<td>opinion leaders</td>
<td>champions</td>
</tr>
<tr>
<td></td>
<td>educational materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>patient-mediated interview</td>
<td>performance feedback</td>
<td></td>
</tr>
<tr>
<td></td>
<td>substitution of tasks</td>
<td>peer reviewed publication</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CQI - Continuous Quality Improvement</td>
<td>press release</td>
<td></td>
</tr>
<tr>
<td></td>
<td>patent license</td>
<td>arts-based KT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>social media</td>
<td>networks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>communities of practice</td>
<td>Café Scientifique</td>
<td></td>
</tr>
<tr>
<td></td>
<td>webinar</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>other ►_________</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

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

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Note: The table includes various options for audience targeting, message sharing, KT goals, and strategies. The text emphasizes the importance of considering the feasibility of KT within the project, including the definition of a Single Most Important Thing or Bottom Line Actionable Message. It also highlights the need to support intent with high quality research evidence and to consider legal and ethical principles in KT efforts. Multifaceted approaches are recommended for greater effectiveness.
(9) KT Process

When will KT occur?

☐ integrated iKT\(^3\) – 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\(^3\) – 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)\(^4\)

☐ usefulness indicators (read/browsed, satisfied with, usefulness of, gained knowledge, changed views)\(^4\)

☐ 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)\(^4\)

☐ partnership/collaboration indicators (# products/services developed or disseminated with partners, # or type capacity building efforts, social network growth, influences, collaborativeness)\(^4\)

☐ 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\(^5\)

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?

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

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

### (12) Budget Items

- accommodation
- art installation
- evaluation specialist
- graphics/imagery
- knowledge broker
- KT specialist
- mailing
- media release
- media product (e.g. video)
- networking functions
- open access journal
- plain text writer

**Estimated costs for items listed**

- production/printing
- programming
- public relations
- reimbursements for partners (e.g. time, parking, travel)
- tech transfer/commercialization
- teleconferencing
- travel: conferences
- travel: meetings/educational purposes
- web 2.0 (e.g. blogs, podcasts, wikis)
- webinar services
- website development
- venue
- other: (list)

**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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