Moving From a Dissemination Plan to Articulated Description:
The Knowledge Translation Planning Template Companion Tool

Presenter: Melanie Barwick
Date: June 23, 2020
Objectives

The webinar presentation will summarize the core components of the KT Planning Template, introduce the Companion Tool, and provide guidance on its use.

Success in research funding and research more generally is often realized through the effective dissemination of research findings to the appropriate audiences so that they may benefit in some way.

The Knowledge Translation Planning Template was developed to support the planning process, but users may struggle with articulating their KT (dissemination) plan within the research proposal.

The KT Planning Template Companion Tool was developed to guide this process.
## Knowledge Translation Planning Template®

**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 videos are available for additional support: [http://melaniebarwick.com/knowledge-translation-tools/](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 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

### 3. Partner Roles

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

### 4. KT Expertise

- Do you require KT expertise and how will this be accessed?
  - Scientists(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: Not all partners will be engaged to the same extent or at the same point in time. Some will be hired for specific activities.*

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

### Notes

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The KTPT
(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

(6) Main Messages (MM)

What is your overarching main message?

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

KU1

KU2

KU3

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

(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 behavior change goals require an

*Note: Have you included any KUs on your project
<table>
<thead>
<tr>
<th>Generate Awareness, Interest, Buy-In</th>
<th>Inform Research</th>
<th>Facilitate Policy Change</th>
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</thead>
<tbody>
<tr>
<td><strong>Audiences</strong></td>
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<td><strong>Role-Based</strong></td>
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<tr>
<td>- Knowledge Broker</td>
<td>- Science collaboration</td>
<td>- Collaboration/partnership (iKT)</td>
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<tr>
<td>- Champion / Opinions leader</td>
<td>- Network</td>
<td>- Science policy fellowship, placement</td>
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<tr>
<td>- Consultant</td>
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<td>- Knowledge broker</td>
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<tr>
<td>- Leadership</td>
<td></td>
<td><strong>Educational</strong></td>
</tr>
<tr>
<td>- Collaboration / partnership</td>
<td>- Peer reviewed publication</td>
<td>- Peer reviewed publications</td>
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<tr>
<td><strong>Educational</strong></td>
<td>- Conference</td>
<td>- Grey literature</td>
</tr>
<tr>
<td>- Materials (guide, toolkit, pamphlet)</td>
<td>- Workshop</td>
<td>- Meeting dialogue</td>
</tr>
<tr>
<td>- Plain language summary</td>
<td>- Synthesis document</td>
<td>- Policy Brief</td>
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<tr>
<td>- Policy brief</td>
<td>- Other document</td>
<td>- Evidence brief/Synthesis;</td>
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<tr>
<td>- Grey literature</td>
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<td>- Stakeholder position paper</td>
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<td>- Publication</td>
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<td>- Rapid response synthesis</td>
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<td>- Workshop, webinar</td>
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<td><strong>Technological</strong></td>
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<td>- Conference</td>
<td>- Social media</td>
<td>- Patent</td>
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<td>- Professional Development</td>
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<td>- In-service training</td>
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<td>- Network</td>
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<tr>
<td>- Media</td>
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</table>

**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

**Commercialization / Technology Transfer**

- Patent
### (9) KT Process

**When will KT occur?**

- **Integrated iKT**[^1] 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**[^1] KT is undertaken at the completion of the project.

- **Both**

   Note: Consider the specifics of your KT procedures and describe elements of your iKT methods.

[^1]: This header seems to be a placeholder or a special format. It is not clear what KT stands for in this context.

### (10) KT Evaluation

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

- **Reach indicators**[^4]
  - (number distributed, number requested, number downloads/hits, media exposure)

- **Usefulness indicators**[^4]
  - (read/browsed, satisfied with, usefulness of, gained knowledge, changed views)

- **Use indicators**[^4]
  - (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**[^4]
  - (number of products developed or disseminated, 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)

(B) **Guiding Questions for Evaluation**[^2]

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
### Resources

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

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

### Budget Items

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

- Accommodation
- Art installation or production
- Evaluation specialist
- Graphics/visual design
- Knowledge broker/specialist
- Mail costs
- Media release
- Media product (e.g. video)
- Networking function
- Open access journal publication
- Writer
- Production/printing
- Other:

**Public relations**

- Reimbursement (e.g. time, parking, travel)
- Technology transfer, commercialization
- Teleconferencing
- Travel: conferences, meetings, educational purposes
- Social media
- Webinar services
- Website development
- Venue

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

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**Sources:**
1. CIHR [http://www.cihr-acr.gc.ca/e/g7125.html](http://www.cihr-acr.gc.ca/e/g7125.html)


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The Problem

HAVING COMPLETED THE KTPT, THE CHALLENGE REMAINS TO TELL THE GRANT REVIEWER YOUR PLAN GIVEN THE FORMAT AND SPACE PROVIDED IN THE FUNDING OPPORTUNITY.

THIS MEANS TURNING YOUR LOGIC MODEL INTO PROSE, AND PEOPLE RUN IN TO THE CLASSIC PROBLEM OF POOR COMPREHENSIVENESS (CORE KT ELEMENTS ARE MISSED) AND LACK OF ALIGNMENT (WHAT MESSAGE, FOR WHOM, WHY, HOW, AND WITH WHAT IMPACT?)
**Knowledge Translation Planning Template© Companion Tool**

**INSTRUCTIONS:** The KTPT Companion Tool helps to shape the content of your KTPT plan into prose that can be inserted into a research proposal or project plan.

<table>
<thead>
<tr>
<th>General Main Message</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Guidance:</strong> This opening sentence sets the stage by describing the overall findings of the study or project.</td>
</tr>
</tbody>
</table>
Integrated KT (iKT)

Guidance: Most descriptions of iKT describe the KUs and perhaps a bit about how they will be involved, but overall, they say very little about the iKT process or intent. Your approach to iKT may evolve as your project unfolds and may not be fully determined at the outset. In this section, describe the knowledge users (KUs) you will be working with, how you will work together, and what their role will be in developing the research/project focus or questions, methods, analysis and interpretation, and end of grant KT deliverables. Consider how and when you will engage with your KUs, how you will scaffold their participation, and support their own sharing about the project within their organizations and networks. Describe the extent to which the KUs are involved with the project and its relevance for them. Develop a memorandum of understanding that lays out time commitment, roles, benefits, risks, process for communication and conflict resolution. Align what you write here with any letters of support provided. Consider what costs are associated with travel, reimbursements, meetings, etc. Describe how you will evaluate the quality of your iKT and whether this approach supported your KT.

Write your iKT section here:
Quality of KT Plans

- Comprehensiveness
- Alignment
- Feasibility
<table>
<thead>
<tr>
<th>COMPREHENSIVENESS</th>
<th>Absent Feature is missing</th>
<th>Weak Feature is vaguely mentioned</th>
<th>Good Feature is briefly described, no elaboration</th>
<th>Excellent Feature is very well described</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Project partners* (who is involved on the project/research team?)</td>
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<td>2) Degree of Engagement [look for authenticity]* (when and how are they involved?)</td>
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<td>3) Partner Roles* (what are their roles relative to conducting the project and especially, developing and realizing the KT Plan?)</td>
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<tr>
<td>4) KT Expertise (team, partnerships, and/or purchased services) relative to proposed KT strategies [is KT expertise listed, if warranted?]</td>
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<td>5) Knowledge Users* (are KUs identified?)</td>
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<tr>
<td>6) Main Messages* (are MMs identified or is the process of developing emerging MMs addressed?)</td>
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<tr>
<td>7) KT Goals* (does the plan describe KT goals for each KU/MM?) is there a description of the purpose of sharing the MM?</td>
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<td>8) KT Strategies* [are KT strategies identified? Are they appropriate given KT goals? How are they rationalized /why these?]</td>
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<td>9) KT Process (integrated and/or end of grant; as appropriate)</td>
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<tr>
<td>10) KT Plan Evaluation* (how will they know the KT goals were achieved?)</td>
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<tr>
<td>11) Resources required* (what resources are needed to conduct the KT activities and deliverables?)</td>
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<tr>
<td>12) Budget for KT* (what funds are requested for KT activities and deliverables? Does the KT budget cover all their KT activities?)</td>
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<tr>
<td>13) Methods for KT plan execution (description of how KT strategies will be conducted and/or KT deliverables developed and executed?)</td>
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</table>

<table>
<thead>
<tr>
<th>ALIGNMENT</th>
<th>Absent</th>
<th>Weak</th>
<th>Better</th>
<th>Excellent</th>
</tr>
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<tbody>
<tr>
<td>Alignment is reflected in description that aligns each main message with a specific knowledge user(s) and related KT goals, KT strategies and indicators of whether the KT goal was met. For example, the main message for parents is (insert MM) with the aim of (insert KT Goal). The KT strategies we will use are (insert KT strategies) and the following indicators (insert indicators) will provide evidence that we successfully met the KT goal.</td>
<td>None of the features are linked/aligned (e.g., description of KUs and KT strategies are separate and don’t relate to each other)</td>
<td>Alignment between 2 features (e.g., KU is linked to a specific KT strategy)</td>
<td>Alignment between 3-4 features (e.g., main messages are linked to a KU and a strategy)</td>
<td>Alignment between 5 features (e.g., main messages are linked to a KU, KT Goal, KT Strategy, and impact indicators)</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>FEASIBILITY</th>
<th>Absent</th>
<th>Weak</th>
<th>Good</th>
<th>Excellent</th>
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<tbody>
<tr>
<td>Team composition (breadth of the team includes a range of skills and competencies, expertise, perspectives – as appropriate)</td>
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<td>Availability of human resource (there are sufficient resources, including people, to get the job done)</td>
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<tr>
<td>Proposed KT strategies are realistic relative to timeline, budget, available resources</td>
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<tr>
<td>The budget includes realistic and comprehensive costs associated with proposed KT activities</td>
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<tr>
<td>The potential for KU benefit or impact is clear and can be realized if the proposed KT plan is fully executed</td>
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</tbody>
</table>

Overall Assessment: tick the category that has the preponderance of scores

Reviewer Comments:
Main messages must align with knowledge users, KT goals, KT strategies, and evaluation indicators.

Align the core KT planning elements.
### Rating Alignment

Alignment is reflected in a description that aligns each main message with knowledge user(s), related KT goals(s), KT strategies, and indicators of whether KT goals were achieved.

- **Absent**: None of the features are linked/aligned (e.g., description of KUs and KT strategies are separate and don’t relate to each other).
- **Weak**: Alignment between 2 features (e.g., KU is linked to a specific KT strategy).
- **Good**: Alignment between 3-4 features (e.g., main messages are linked to a KU and a strategy).
- **Excellent**: Alignment between 5 features (e.g., main messages are linked to a KU, KT Goal, KT Strategy, and Impact Indicator).

1) What degree of alignment is evident in the KT plan?
End of Grant KT

**Guidance:** Most KT plans describe KUs and strategies without alignment to each other or to other elements of a quality KT plan (see KTPT tool and KT-PAT tool). The KT description should demonstrate specifics of your plan with this alignment in mind.

**Example:**

“Knowledge translation will occur at the end of the grant/project. Several knowledge user (KU) audiences may benefit from learning about our study. Each KU is described below, alongside the targeted main message(s), potential for benefit(s) or KT goal(s), strategies to be used, and indicators of KT goal attainment. Required resources are described in the budget. We will target (KU#1...KU#X) to communicate (insert main message) for the purpose(s) of (insert KT goal; i.e., building awareness, knowledge, etc.). Best evidence for strategies that may support these KT goals has lead us to select the following strategies (describe them). We will track/evaluate the following indicators to ensure we are successful in attaining our KT Goal (describe).”

**Repeat** this pattern for each KU where the main messages, KT goals and strategies are different.

**Write your EoG section here:**
What Not to Do

“We will involve the following knowledge users (list)...”

“We will use the following KT strategies (list)...”
If you do this, you are missing the following:

- What you are planning to communicate (main messages)
- To which knowledge users
- For what purpose
- With what strategy(ies)
- With what impact (evaluation)
Using community-engaged methods to adapt virtual reality job-interview training for transition-age youth on the autism spectrum

Matthew J. Smith, Rogério M. Pinto, Leann Dawalt, J.D. Smith, Kari Sherwood, Rashun Miles, Julie Taylor, Kara Hume, Tamara Dawkins, Mary Baker-Ericzén, Thomas Frazier, Laura Humm, Chris Steacy
Abstract:
Background

Consider:
1) Who would be interested/could benefit from this research?
2) When should you engage with them, why, and how?
3) What do you know about their knowledge needs?
4) What do you know about where and how they currently access information?
5) What do you know about KT methods that are effective for your intended purpose and with this population?
Abstract:

Methods

Consider:
1) In what way was this an integrated KT approach?
2) How does this help your KT plan?

Integrated KT (iKT)

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Write your iKT section here:
Abstract: Results & Conclusion

Results: Our adaptations included adding diversity (gender; race/ethnicity) to the virtual hiring manager; shortening the interview by reducing response options; increasing social storytelling to enhance engagement with VR-JIT core components; adding employment opportunities more relevant to younger workers; reducing the reading level; and making the e-learning content more accessible by adding bullet points, voiceover, and imagery/video; and adding new learning goals.

Conclusions: This study presents a rigorous and innovative community-engaged methodology for adapting VR-JIT to meet the needs of TAY-ASD. We review our engagement with TAY-ASD and stakeholders, and discuss the standardized coding scheme we used to adapt VR-JIT and the usefulness and limitations of employing this methodology in adapting other behavioral interventions.

Consider:
1) What are the main messages?

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End of Grant KT: Recreation

“Our KT plan is to share results with a range of knowledge users, largely to promote awareness of our interview method among those who may benefit. Our specific KT activities will be emergent (as per our engagement with knowledge users [iKT]) and are as follows:

EoG KT #1: We will build awareness and knowledge (the purpose) of our adapted job interview training among school counselors using (identify strategies). We will evaluate the impact of our KT strategies using the following indicators:

EoG KT #2:
Be careful about:

- Not morphing from dissemination planning, which is what the KTPT addresses, into implementation planning. These are not the same thing and require different approaches.

- Consider what the evidence suggests regarding effective strategies.

- Consider the feasibility of what you are proposing: team composition, time, cost/resources.
Any questions?
Thank you!

We invite you to:

• Provide your input on today’s webcast.
• Share your thoughts on future webcast topics.
• Contact us at kter@air.org.

Please fill out the brief evaluation form:

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