



National Collaborating Centre
for Methods and Tools
Centre de collaboration nationale
des méthodes et outils

How to use the Knowledge Translation Planning Template © (2008, 2013) presented by developer Dr. Melanie Barwick, Scientific Director of Knowledge Translation at The Hospital for Sick Children.

featuring a story of implementation from the Centre for Addiction and Mental Health

Introduction

Welcome to the fifth installment of the NCCMT Spotlight on KT Methods & Tools. This edition will focus on the Knowledge Translation Planning Template © (2008, 2013) developed by Dr. Melanie Barwick, and will draw on Keri West of The Centre for Addiction and Mental Health for examples of the template's use in practice. Dr. Barwick is a Senior Associate Scientist, Community Health Systems Resource Group, Psychiatry and Scientific Director of Knowledge Translation for the Child Health Evaluative Sciences program, Research Institute at The Hospital for Sick Children, and an Associate Professor of Psychiatry at the University of Toronto. Keri West is a Knowledge Broker with the Evidence Exchange Network at the Centre for Addiction and Mental Health, and has worked internationally as a consultant in areas ranging from health to entertainment.



The Knowledge Translation Planning Template ©

The Knowledge Translation Planning Template © grew out of a need for systematic thinking about the different key elements of a thorough knowledge translation (KT) plan. In 2008, Dr. Barwick was becoming involved in several projects, and needed a way to develop a KT plan for projects in which she was not the content expert. At the same time, funders were beginning to require greater detail about KT activities as a component of grant applications. These needs were met through the development of the KT Planning Template ©, which was designed to facilitate reflection and consideration of the key parts of a KT plan in any research field.

Component	Objective	Activity	Resource	Evaluation
Knowledge Translation Objectives	Identify the knowledge to be translated	Conduct a knowledge audit	Knowledge audit tool	Knowledge audit report
Knowledge Translation Objectives	Identify the target audience	Conduct a stakeholder analysis	Stakeholder analysis tool	Stakeholder analysis report
Knowledge Translation Objectives	Identify the knowledge gaps	Conduct a knowledge gap analysis	Knowledge gap analysis tool	Knowledge gap analysis report
Knowledge Translation Objectives	Identify the knowledge sources	Conduct a knowledge source analysis	Knowledge source analysis tool	Knowledge source analysis report
Knowledge Translation Objectives	Identify the knowledge users	Conduct a knowledge user analysis	Knowledge user analysis tool	Knowledge user analysis report
Knowledge Translation Objectives	Identify the knowledge barriers	Conduct a knowledge barrier analysis	Knowledge barrier analysis tool	Knowledge barrier analysis report
Knowledge Translation Objectives	Identify the knowledge enablers	Conduct a knowledge enabler analysis	Knowledge enabler analysis tool	Knowledge enabler analysis report
Knowledge Translation Objectives	Identify the knowledge facilitators	Conduct a knowledge facilitator analysis	Knowledge facilitator analysis tool	Knowledge facilitator analysis report
Knowledge Translation Objectives	Identify the knowledge inhibitors	Conduct a knowledge inhibitor analysis	Knowledge inhibitor analysis tool	Knowledge inhibitor analysis report
Knowledge Translation Objectives	Identify the knowledge promoters	Conduct a knowledge promoter analysis	Knowledge promoter analysis tool	Knowledge promoter analysis report
Knowledge Translation Objectives	Identify the knowledge sustainers	Conduct a knowledge sustainer analysis	Knowledge sustainer analysis tool	Knowledge sustainer analysis report
Knowledge Translation Objectives	Identify the knowledge maintainers	Conduct a knowledge maintainer analysis	Knowledge maintainer analysis tool	Knowledge maintainer analysis report
Knowledge Translation Objectives	Identify the knowledge protectors	Conduct a knowledge protector analysis	Knowledge protector analysis tool	Knowledge protector analysis report
Knowledge Translation Objectives	Identify the knowledge transformers	Conduct a knowledge transformer analysis	Knowledge transformer analysis tool	Knowledge transformer analysis report
Knowledge Translation Objectives	Identify the knowledge changers	Conduct a knowledge changer analysis	Knowledge changer analysis tool	Knowledge changer analysis report
Knowledge Translation Objectives	Identify the knowledge shapers	Conduct a knowledge shaper analysis	Knowledge shaper analysis tool	Knowledge shaper analysis report
Knowledge Translation Objectives	Identify the knowledge movers	Conduct a knowledge mover analysis	Knowledge mover analysis tool	Knowledge mover analysis report
Knowledge Translation Objectives	Identify the knowledge influencers	Conduct a knowledge influencer analysis	Knowledge influencer analysis tool	Knowledge influencer analysis report
Knowledge Translation Objectives	Identify the knowledge disseminators	Conduct a knowledge disseminator analysis	Knowledge disseminator analysis tool	Knowledge disseminator analysis report
Knowledge Translation Objectives	Identify the knowledge implementers	Conduct a knowledge implementer analysis	Knowledge implementer analysis tool	Knowledge implementer analysis report
Knowledge Translation Objectives	Identify the knowledge evaluators	Conduct a knowledge evaluator analysis	Knowledge evaluator analysis tool	Knowledge evaluator analysis report
Knowledge Translation Objectives	Identify the knowledge assessors	Conduct a knowledge assessor analysis	Knowledge assessor analysis tool	Knowledge assessor analysis report
Knowledge Translation Objectives	Identify the knowledge monitors	Conduct a knowledge monitor analysis	Knowledge monitor analysis tool	Knowledge monitor analysis report
Knowledge Translation Objectives	Identify the knowledge reviewers	Conduct a knowledge reviewer analysis	Knowledge reviewer analysis tool	Knowledge reviewer analysis report
Knowledge Translation Objectives	Identify the knowledge approvers	Conduct a knowledge approver analysis	Knowledge approver analysis tool	Knowledge approver analysis report
Knowledge Translation Objectives	Identify the knowledge signatories	Conduct a knowledge signatory analysis	Knowledge signatory analysis tool	Knowledge signatory analysis report
Knowledge Translation Objectives	Identify the knowledge end-users	Conduct a knowledge end-user analysis	Knowledge end-user analysis tool	Knowledge end-user analysis report

Using the Template – Identifying the Team

Dr. Barwick recommends that those using this tool should first connect with core collaborators and engage in a dialogue using the KT Planning Template © as a guide for considering all necessary steps that a reviewer would look for in a grant application. The first of these steps is to determine who the research partners are for the project. Using the template, check all positions that apply to the project team, understanding that this list is meant to be illustrative rather than exhaustive. For example, despite “Educators” not being listed, they can – and in some cases, should – still be included in the project team. Additionally, it should be noted that the roles of research partner and knowledge user are not mutually exclusive, and can overlap.

Team Involvement and KT Expertise

Once partners are identified, the natural next step is to determine at which points throughout the project they will be involved. At times, this step is dictated by funders’ requirements about collaboration between knowledge producers and users. However, in general it is always helpful to discuss this with partners from the beginning. After this is determined, the next step is to assess the KT expertise of the team, and decide whether there is a need for additional KT support.

Refining the Main Message

At this point, it is time to turn the team’s attention to the main message of the project. Even if the main message is contingent on the research being planned, the team should still devote thought to the audiences to target and the messages that may emerge. Dr. Barwick recommends teams identify two essential concepts for each message: the Single Most Important Thing (SMIT), and the Bottom Line Actionable Messages (BLAM). These two elements are an essential component of the main message of a KT plan.

Message Target and Goals

Identifying main messages is intertwined with identifying audiences. The KT Planning Template © outlines a list of suitable audiences for a KT activity for users to check off as message targets are selected. Following this, the next step is to consider the message’s intended impact on those audiences. Is the message intended to raise awareness, impart knowledge, inform research, change behaviour, or something else entirely? The purpose of the message will impact the strategy.

(1) Research Partners

- researchers
- consumers - patients & their families
- the public
- decision-makers
- policy makers (government or other)
- private sector / industry
- research funding body
- volunteer health sector / NGO
- practitioners

(2) Degree of Partner Engagement

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

(3) KT Expertise on Team

- scientist(s) with KT expertise
- consultant with KT expertise
- Knowledge Broker / Specialist
- KT supports within the organization
- KT supports within partner organization

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(4) Main Messages

Briefly, your research seeks to:

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

➤

OR

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

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(5) KT Audience(s)

What 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 capital
- volunteer health sector / NGO

(6) KT Goals

What are your KT Goals for each audience?

Audiences (2)

① ② ③

↓ ↓ ↓ Generate...

- awareness
- interest
- practice change
- behaviour change
- policy action

Impact...

- knowledge
- tools

Inform...

- research
- product
- patient

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Selecting KT Methods

Once the audience, message, and purpose of the KT has been identified, teams must consider which KT method best suits the goal. For this step, Dr. Barwick has grouped KT methods in terms of effectiveness as summarized in research from 2003. While Dr. Barwick admits that this information is dated, at the time of this presentation it remains the most recent systematic review of KT method effectiveness. Overall, Dr. Barwick recommends that this list be used as a “pick list,” and that the ratings of method effectiveness be interpreted with a critical eye.

(7) KT Method(s)
What KT methods you will use?
For example:
Audiences: (2)
1 2 3
① Most Effective¹
 interactive small group
 educational outreach
 reminders
 IT decision support
 multi-prof collaboration
 mass media campaign
 financial incentive
 combined interventions^{2,4}
② Limited Effects²
 CQI
③ Unknown Effects³
 press release
 patient license
 arts-based KT
 social media
 networks
 communities of practice
 Café Scientifique
 webinar
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KT Timing, Evaluation, and Partner Roles

Following the selection of KT methods, the KT Planning Template © recommends reflecting on the timing of KT activities. Will the KT process be integrated throughout the project, solely at the end, or both? The next step is consideration of evaluation. As a team, take some time to decide on the indicators to use to measure impact. Does it make most sense to measure the reach, usefulness, or use of the KT, and how would this be done? Additionally, what role will partners play? This is important when applying for funding that explicitly requires user involvement.

(8) KT Process
When will KT occur?
 Integrated KT¹ –
 End of grant KT².
 Both
(9) KT Impact & Evaluation
(a) Where do you want to have an impact?
 health / well-being outcomes
 [clinical] practice
 [health] policy/service
 research
(b) How will you evaluate if you achieved your KT goals?
 Reach indicators
 Usefulness indicators
 Use indicators
 Partnership / collaboration indicators
 Practice change indicators
 Program or service indicators
 Policy indicators
(e) Partner(s) Role
How will your partner(s) assist with developing, implementing or evaluating the KT plan?
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Assessing Project Needs

Nearing the end of the tool, it is important to take stock of the needs of the project. What resources will be needed in order to be successful? What items should the team budget for? And what will the approximate cost of these items be? Dr. Barwick recommends being straightforward, honest, and realistic with budgeting. Moreover, be aware of additional funding opportunities available through different funders for when project ambition risks out-pacing available funds.

(11) Resources
What resources are required?
(12) Budget Items
What budget items are related to the KT plan?
(13) Estimated Costs
(a) Do you intend to seek additional support for KT?
>
From whom?
>
(b) List estimated costs for items listed in box #12:
>
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Generating an Implementation Strategy

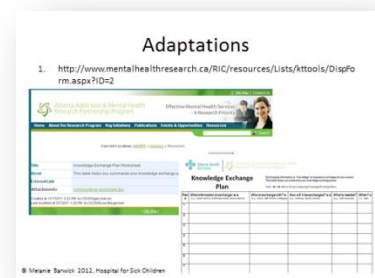
The final section of the KT Planning Template © asks users to consider the implementation plan for the KT plan. Dr. Barwick distinguishes the implementation plan from the KT strategy by describing KT strategy as the mechanisms that will be used to convey new information. Alternately, the implementation plan is the process and procedures involved with applying KT strategies. It describes the details of how that strategy will be realized, and helps ensure the KT is done with fidelity and maintains quality.

(14) Describe how you will implement your KT strategy.
>
Implementation refers to the process involved with applying your KT strategies and ensures that the knowledge you are transferring is done with fidelity and maintains quality.
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A resource from the National Collaborating Centre for Methods and Tools www.nccmt.ca

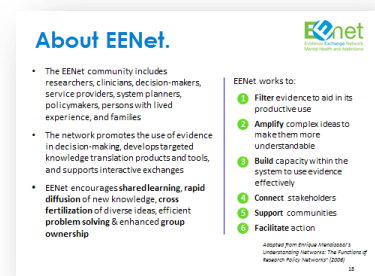
Adaptations

Since making the KT Planning Template © available online, Dr. Barwick has seen it adapted for use in Alberta, Quebec, York University, and Sick Kids Foundation, and is happy for others to adapt it for their use providing they cite the KT Planning Template © as a source and that the adaptation is shared with her. Finally, Dr. Barwick would like to emphasize that, as a reviewer for Canadian Institutes of Health Research, the consistency with which she still sees disjointed and poorly organized KT plans illustrates the systemic need for the adoption of a structured tool as part of KT planning.



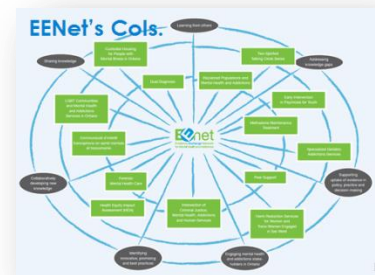
Seeing the tool in practice

The Evidence Exchange Network (EENet) is an Ontario mental health & addictions knowledge exchange (KE) network. They facilitate interactive exchanges of knowledge between stakeholders across the province, such as researchers, policy-makers, clinicians, and those with lived experience in the field of mental health and addictions. EENet promotes the uptake of evidence – defined as research findings, lived experience, and practice-based knowledge – in policy and practice by developing KE products and tools. To facilitate this mission, EENet has made use of the KT Planning Template within two major projects.



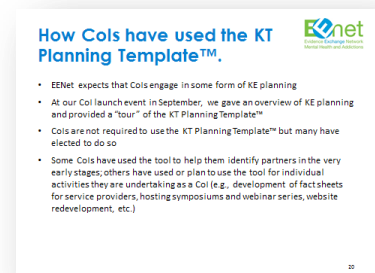
Communities of Interest Initiative

In 2012, EENet invited groups of stakeholders with common interests to submit an expression of interest in becoming a Community of Interest (CoI). Each CoI would be a mini-network within a wider web of communities. 14 communities were selected, and each received dedicated knowledge broker support as well as technological and network resources. EENet envisions the CoI as a forum for KE and collaborative knowledge creation for members with common interests.



KT Planning with CoIs

One of the requirements of becoming a CoI and receiving support from the network is to engage in some form of KE planning. Since KE is increasingly emerging as a field necessitating models and theoretical principles, there continues to be a mounting need for appropriate tools to guide this type of thinking. To curb this need, EENet provided the KT Planning Template as it was found to be among the more rigorous, comprehensive planning frameworks for KE planning. An added benefit of using the KT Planning Template was that it allowed CoI members with a wide breadth of experience in KE to have a standardized planning process as well as a uniform starting point for KE discussions.



A resource from the National Collaborating Centre for Methods and Tools www.nccmt.ca

These webinar companions summarize *Spotlight on KT Methods and Tools* presentations. The webinar series is presented in partnership with the University of Ottawa's CHNET-Works! How to cite this document : National Collaborating Centre for Methods and Tools. (2013). Webinar Companion : Spotlight on KT Methods and Tools. Episode 5. Hamilton, ON: McMaster University.

Drug Treatment Funding Plan

In addition to the Col initiative, EENet also takes part in Health Canada's Drug Treatment Funding Plan (DTFP), which is a federal contribution program designed to support provinces and territories in their efforts to strengthen evidence-informed substance abuse treatment systems, with a focus on at-risk youth. EENet is one of the 11 DTFP Systems Projects funded in Ontario, and also acts as a conduit for KE between the other 10 Systems Projects.

Using the KT Template within DTFP

Each EENet knowledge broker has a subset of DTFP Ontario Systems Projects for which they provide KE support. Knowledge brokers have worked with each project team to develop a KE plan using the tool as a guide. While not all Systems Projects initially considered KE planning as part of their proposal to Health Canada, each has adopted the KT Planning Template as part of their plan.

Health Canada's Drug Treatment Funding Program

- The DTFP is a federal contribution program designed to support provinces and territories in their efforts to strengthen evidence-informed substance abuse treatment systems; and address critical gaps in substance abuse treatment services, particularly for at-risk youth
- Eleven Systems Projects have been funded in Ontario, of which EENet is one
- EENet is the vehicle through which knowledge exchange is taking place for the suite of systems initiatives receiving funding through the DTFP in Ontario
- EENet leverages its 'network of networks' and targeted knowledge translation and exchange products and tools to bring visibility to Ontario's DTFP-funded systems projects

How the DTFP Ontario Systems Projects have used the KT Planning Template™.

- EENet Knowledge Brokers provide dedicated KE support to the Ontario Systems Projects. Knowledge Brokers have worked collaboratively with each project team to develop a KE plan using the tool as a guide
- KE plans were developed at various stages in each project, however, KE planning generally took place after idea formulation (i.e., KE plans were not developed as part of the project proposal)

Strengths of the KT Planning Template ©

Through using the KT Planning Template so extensively, EENet has become familiar with many of its strengths. EENet has found the flexibility of the tool allows the final product to take many shapes, from a narrative report to a work plan. It makes nebulous KE concepts concrete while encouraging KE planning at the start of a project, and standardizes the process to accommodate users of all experience levels. Additionally, it helps develop key messages from research with an impact-oriented and audience-focused mindset.

Strengths of using the tool.

- Flexible; able to adapt KE plan to the needs of the project
- Helps to operationalize nebulous KE concepts
- Encourages KE thinking from the start of the project
- Provides an easy-to-use, comprehensive framework for KE planning for all experience levels
- Assists in the development of key messages and strategies to deploy these messages
- Helps to identify opportunities for and support the uptake of project findings in policy and practice to maximize the impact of the project and the value of investments
- Promotes impacts-oriented thinking from the outset

Challenges using the KT Planning Template ©

Currently, one of the challenges in using the template is that the flexibility it offers can manifest as a lack of clarity, especially for first-time users. Additionally, the lack of guidance in the implementation section can lead to users feeling lost in this section, as the creation of an implementation plan can be a daunting task. Finally, EENet has learned through experience that no template can replace the impact of buy-in from the project team, and having them understand and believe in the value of the KE planning process is a priceless element of any KE plan.

Challenges of using the tool.

- Lack of clarity regarding the format of the final product
- The research language often does not resonate in a non-research context
- Lack of guidance/prompts in the implementation section of the template
- Buy-in from the project team is critical! The KE plan will not be effective if the project team is not invested or does not see the value in the planning process
- Engaging in KE planning either too early or too late in the project may limit its effectiveness