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.
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.
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.

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.

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.

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.
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 Cols
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.
Drug Treatment Funding Plan
In addition to the CoI 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.

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.

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.