This template guides teams through the four stages of Research Translation: Partnership, Process, Translation Product, and Dissemination. The template is meant to be utilized after team formation and during the process of determining partner roles and developing work plans. It will inform the early-stage planning process and guide future planning with activities and thought processes critical in effectively translating research into practice. Projects are encouraged to revisit this planning template to see how tracked progress reflects initial planning and whether the implementation plan needs revision to guide future work.

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| --- | --- | --- | --- | --- |
| Project Title: | | | | |
| Project Team: | | | | |
| Goal(s) of Research Translation: | | | | |
| Partnership | | | | |
| Partnership is a critical stage in research translation. The formulation of the research to translation project team and structures will ultimately guide how partners work together. Fill in this section to work through partner roles, stakeholders involved, and other early stage foundational components that will set the stage for a strong partnership and strong research translation project. | | | | |
| Have you considered whether to form a project advisory group? | | * Yes * No | Notes/Next Steps: | |
| Have you identified individuals, organizations, and networks who might partner with your team as research translation partners? | | * Yes * No | If so, who? | |
| Which of the following stakeholder groups are included in your partnerships? | | | | |
| * Funders * Media | * Policymakers * Private sector | * Professional organizations * Public | | * Researchers * Service organizations |
| In which of the following research project steps do your partners play roles? | | | | |
| * Ideation | | Partner(s) responsible: | | |
| * Research Question Formation | | Partner(s) responsible: | | |
| * Project Design | | Partner(s) responsible: | | |
| * Data Collection and Analysis | | Partner(s) responsible: | | |
| * Product Development | | Partner(s) responsible: | | |
| * Dissemination of Results and Recommendations | | Partner(s) responsible: | | |
| Have you communicated partners’ roles and degrees of involvement in a scope of work (SOW)? | | * Yes * No | Notes/Next Steps: | |
| Have you documented a process for keeping partners informed throughout the project cycle? | | * Yes * No | Notes/Next Steps: | |
| Have you established a cost structure for the partnership? | | * Yes * No | Notes/Next Steps: | |
| Have you clarified intellectual property rights between partners (e.g. file sharing, data ownership, branding, etc.) in a formal written agreement? | | * Yes * No | Notes/Next Steps: | |
| Have you documented a communication structure with donors? | | * Yes * No | Notes/Next Steps: | |
| Have you assessed each partner's needs? What do partners value? | | * Yes * No | Notes/Next Steps: | |
| What human resources are necessary for the successful implementation of this project? Which ones are currently available and which ones are still needed? | | | | |
| What financial resources do you have and need? What gaps exist between the two? Do you anticipate having any issues moving forward? | | | | |
| Process | | | | |
| The process stage will guide you in research translation from setting up how you will structure your project to how you will work together with partners. Engage in the activities below and track progress to guide the process by which you begin to collaborate and engage stakeholders toward effectively conducting research translation and communicating your translated research. | | | | |
| Have you finalized your budget and travel needs? | | * Yes * No | Notes/Next Steps: | |
| Have you finalized your work plan and timeline? | | * Yes * No | Notes/Next Steps: | |
| Have you acquired IRB approval (if applicable)? | | * Yes * No | Notes/Next Steps: | |
| Have you determined reporting procedures? | | * Yes * No | Notes/Next Steps: | |
| Have you mapped relevant stakeholders and identified key audiences? | | * Yes * No | Notes/Next Steps: | |
| Identify three key audiences to engage throughout the project and during the dissemination phase:   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Have you conducted a needs analysis of key audiences? | | * Yes * No | Notes/Next Steps: | |
| If so, summarize the needs of each key audience:   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Have you conducted a context analysis or related procedure to identify factors that facilitate and/or hinder research translation? | | * Yes * No | Notes/Next Steps: | |
| If so, summarize the results of the context analysis for each key audience:   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Have you documented a process for engaging key audiences throughout the project? | | * Yes * No | Notes/Next Steps: | |
| If so, summarize engagement procedures for each key audience:   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Have you identified and engaged others who might help you to gain access to key audiences, including potential messengers or “champions” of your work? | | * Yes * No | Notes/Next Steps: | |
| If so, identify these others in relation to each key audience:   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Does the research design take into consideration the needs of end users? | | * Yes * No | Notes/Next Steps: | |
| Product | | | | |
| Product for research translation is the key aspect, whether it is a recommendation or a physical item intended for use, that has specifically been adapted to meet the needs of an audience, based upon the conclusions of research. Potential products include briefs, trainings, manuals, gadgets, and educational materials intended to create change. Note that products must be shared through a certain channel applicable to your audience. Complete this section to ensure intended products are appropriate for audiences and will maximize impact in the area. | | | | |
| What key knowledge do you want to mobilize? What are the main messages that you want to share? | | | | |
| To whom are these messages meaningful, and why? Who has an interest in or could benefit from these messages? | | | | |
| What is the desired goal or outcome of sharing these messages? | | | | |
| Have you planned for the creation of research translation products that align with key audience needs? | | * Yes * No | Notes/Next Steps: | |
| What research translation products will be shared with each key audience?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What action do you expect each key audience to take upon receipt of or in reaction to the products you develop? Check to make sure the audience will have sufficient knowledge and understanding to take said action.   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What methods will be used to share these products with end user audiences (e.g. meetings, conferences, presentations, phone calls, webinars, e-mails, working groups, communities of practice, etc.)? Be specific.   * Audience 1: * Audience 2: * Audience 3: | | | | |
| Dissemination | | | | |
| Dissemination is targeted communication with specific audiences for the purpose of continuing the uptake of results and usage of products. Strategies elaborated on below will enable your project to effectively deliver solutions to the right actors in development toward eventual scale and wider application of your development solution. Although this section comes at the end, it requires extensive planning from the beginning of a project. | | | | |
| What are the research translation objectives for each key audience (e.g. promote interest, elicit feedback, improve practice, etc.)?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What are the engagement strategies for each key audience toward promoting research translation?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| When is it preferable to implement the strategies for each key audience, and at what stage(s) will you share information?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What methods will be used to share products and findings with audiences (e.g. meetings, conferences, presentations, phone calls, webinars, e-mails, working groups, communities of practice, etc.)? Be specific.   * Audience 1: * Audience 2: * Audience 3: | | | | |
| How will each key audience benefit from the information they receive through research translation?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What are the barriers that could limit information sharing for each key audience?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What can be done to reduce the barriers for each key audience?   * Audience 1: * Audience 2: * Audience 3: | | | | |
| What strategies do you have to engage with others beyond your key audiences toward sustainability of your project or the continued application of your findings? | | | | |
| Do you have a project champion to continue to advocate for change? | | * Yes * No | Notes/Next Steps: | |
| What other avenues exist for replication or scale of your project or findings? Consider post-project events and opportunities to continue dissemination after the project ends. | | | | |
| Evaluation | | | | |
| Evaluation is critical in research translation as an iterative process. We encourage projects to continually monitor engagements toward research translation and consider the questions below as learning opportunities for both your project and other projects. Track information to assist in evaluation and consider utilizing an external evaluator to help with your learnings. | | | | |
| Did you produce what you intended? | | * Yes * No | Notes/Next Steps: | |
| Were the translated products accurate for your key audiences? | | * Yes * No | Notes/Next Steps: | |
| Did dissemination activities reach enough people? | | * Yes * No | Notes/Next Steps: | |
| Did the right people receive the products? | | * Yes * No | Notes/Next Steps: | |
| Did audiences understand the messages and act on them? | | * Yes * No | Notes/Next Steps: | |
| Did policy or practice change? | | * Yes * No | Notes/Next Steps: | |
| Did your plan for research translation lead you to reaching your goals? | | * Yes * No | Notes/Next Steps: | |
| Did you budget adequately? | | * Yes * No | Notes/Next Steps: | |

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