Request for Proposal Knowledge Translation

Project to develop and support the monitoring and evaluation work of Cochrane's Knowledge Translation strategy

Trusted evidence.
Informed decisions.
Better health.

Contents

25 September 2019

1 Background

Cochrane's vision is world of improved health where decisions about health and health care are informed by high-quality, relevant and up-to-date synthesized research evidence. Knowledge Translation in Cochrane is defined as *"the process of supporting the use of health evidence from our high quality, trusted Cochrane Reviews by those who need it to make health decisions."* The Cochrane Knowledge Translation Framework provides a strategy for thinking about Knowledge Translation and has been developed into an Implementation Plan. The activities and outputs produced as part of the Knowledge Translation (KT) implementation programme are designed to facilitate and increase the use of Cochrane evidence in practice globally – but how can we more formally understand whether our outputs have achieved this aim?

A 'programme theory' such as 'theory of change' is a useful tool to presenting the rationale for the programme design by articulating the connection between the current situation, the planned implementation activities and their outputs, and the expected intermediate and ultimate outcomes. Once documented, the programme theory can be used as the basis of an evaluation plan (framework) which can be used to monitor the progress and impact of planned activities. This project will develop the programme theory and use this to develop a pragmatic evaluation plan which can be used by the KT department to monitor and evaluate their work.

Across Cochrane all KT activities are designed and implemented in a way which we hope is most likely to impact on the usefulness, and the use of, our reviews, which may include translation into different languages. However, we know that understanding how to monitor and evaluate knowledge translation work is a topic which has consistently been identified as a priority within Cochrane. As more Cochrane groups develop KT strategies for their entities, providing support (which may include training, guidance and examples/case studies) to develop mechanisms for monitoring and evaluation of their work is imperative so that we can understand the impact of our work on affecting change in policy and practice.

2 Aim

- To develop an agreed 'programme theory' (theory of change or equivalent model) for each of the target audiences defined within Cochrane's KT Framework.

- To develop an evaluation plan (framework) based on the 'programme theory', that can be used to monitor the progress and impact of Cochrane's KT implementation programme.

- To provide support to people within Cochrane to further the understanding and use of monitoring and evaluation mechanisms to monitor the progress and impact of their knowledge translation work.

3 Objectives

1. To develop, validate and agree a programme theory (theory of change or equivalent model) for each of the four target audiences as determined in the KT Framework (consumers and the public; practitioners; policy-makers and healthcare managers; researchers and research funders).

2. Using the agreed programme theories in Objective 1, develop an evaluation plan and tools for monitoring Cochrane's KT implementation activities, facilitated by Cochrane's Knowledge Translation Department to evaluate their impact, across each of the four KT audiences.

3. Provide training, tools and guidance for people working across Cochrane to:

   a. To understand the importance of planning for monitoring and evaluation;

   b. To develop a model on which to plan their own KT strategies, relevant to their Group, language and setting;

   c. To use their model to develop a framework for monitoring and evaluating their KT strategies.

4 Scope of work

4.1 Objectives 1

4.1.1 Deliverables
- A programme theory (theory of change or similar logic model), validated internally and externally, and agreed by the KT Advisory Group, for each of the four KT audiences. The programme theories will articulate the linkage between the ultimate outcome of the changes we would like to see in each KT audience (policy, practice and/or behaviour) with the implementation activities and outputs planned. The programme theories should to take into account, and be relevant to, diverse linguistic and cultural perspectives.

4.1.2 Process
1. Work with a small group of Cochrane KT staff/Working Group members and advisors to understand context of KT projects currently underway or planned. This may involve organizing and facilitating interviews and/or workshops.

2. Work with people from the four KT target audiences (including representation from those with diverse linguistic and cultural perspectives) to understand current challenges in the uptake and use of Cochrane evidence. This may involve organizing and facilitating interviews and/or focus groups.

3. Using the information gained, draft a programme theory for each of the four target audiences listed in the KT framework, using a consistent format:

   a. Draw on existing resources from within Cochrane, where available (such as the work completed for policymakers in Appendix 1)

   b. Draw on existing material for equivalent programmes outside Cochrane, where appropriate

   c. Draw on the existing evidence for developing programme theories

4. Validate the programme theories through consultation with a wider group of people (including from diverse linguistic and cultural perspectives) from both within Cochrane and members of KT target audiences. This may involve organizing and facilitating interviews and/or workshops.

5.   Agree and finalize the final programme theories with the KT Advisory Group and Cochrane's Central Executive Senior Management Team.

4.2   Objective 2

4.2.1   Deliverables
- Based on the programme theory agreed in Objective 1, develop an evaluation plan (framework) and tools that can be used to monitor and evaluate Cochrane's KT implementation work.

4.2.2   Process
Using the agreed programme theories and information gained as part of Objective 1, work with members of the Cochrane Knowledge Translation community (including those with diverse linguistic and cultural perspectives) to prioritize and agree the key monitoring and evaluation questions:

Based on these key questions and working with members of the Cochrane KT Department, develop a single, practical monitoring and evaluation framework which should include, for each key outcome, information about:
- the key indicators which should be measured (including definitions);
- where the information will come from;
- the frequency of measurement;
- who would be responsible; and,
- how it will be reported.

The draft frameworks should be presented to the KT Advisory Group and key representatives across Cochrane for comment, discussion and agreement.

4.3   Objective 3

4.3.1   Deliverables
- Provide training resources, tools and guidance for people working across Cochrane to:

    o   To understand the importance of planning for monitoring and evaluation;

    o   To develop a model on which to planning their own KT strategies, relevant to their Group, language and setting;

    o   To use their model to develop a framework for monitoring and evaluating their KT strategies.

    Training resources could be in the form of online learning modules, materials for workshops, and webinar sessions as deemed appropriate. Training resources should be prepared in English but take into account that they may be translated into different languages, and should be suitable for people working across different cultural perspectives.

- At least one workshop session (90 minutes) on monitoring and evaluation of KT activities should be held at the Cochrane Colloquium in Toronto in October 2020.

- At least one webinar session (60 minutes) on monitoring and evaluation of KT activities should be held before the end of 2020.

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4.3.2 Process

Using the organizational experience and training needs of people working within Cochrane gained through delivering objectives 1 and 2, develop training materials and resources to support members of the Cochrane community to be able to develop plans and frameworks for monitoring and evaluating their KT work programmes.

The successful tender should include provisions for small-scale user-testing of the developed resources and refinement as required based on the testing. Training should be delivered for Community staff and members to effectively use the resources.

5 Timelines

The proposal should include a draft timeline of key milestones required in delivering the scope of work as presented in section 4. The objectives should be delivered in a detailed project plan with face-to-face training provided at the **Toronto Colloquium 4-7 October 2020.**

6 Budget

The group must present an estimate of the budget for the work including a breakdown by the elements contained within the scope of work and delivery of the project and key time-frames for delivery.

7 Competency and Expertise Requirements

It is likely the selected tender will involve the expertise of a number of individuals who, between them, will make up a project team and will have the following skills:

- An in-depth understanding of programme theory (logic models and/or theory of change) and monitoring and evaluation framework; and, with the expertise and experience to apply this understanding into practical implementation.

- Experience of working with at least one of the Cochrane's KT audiences to develop both programme theories (logic models and/or theory of change) and developing monitoring and evaluation frameworks based on these with a focus on implementation.

- Proven experience of developing and implementing practical tools for monitoring and evaluation either within Cochrane or similar institutions, including user-testing and incorporating feedback.

- Experience of developing and delivering training on monitoring and evaluation.

- Experience of working with people from diverse linguistic and cultural perspectives.

- Proven record of delivering project to a high quality, on time and to budget.

- It is highly desirable that the team has a good knowledge of Cochrane's organizational structure and culture.

8 Evaluation Criteria

Proposals will be evaluated against:

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- Their detailed plans for meeting the scope of work as set out in section 4: Scope of Work;

- The skills and expertise available within the proposed project team;

- The budget and timescales proposed for the project.

9 Reporting Requirements
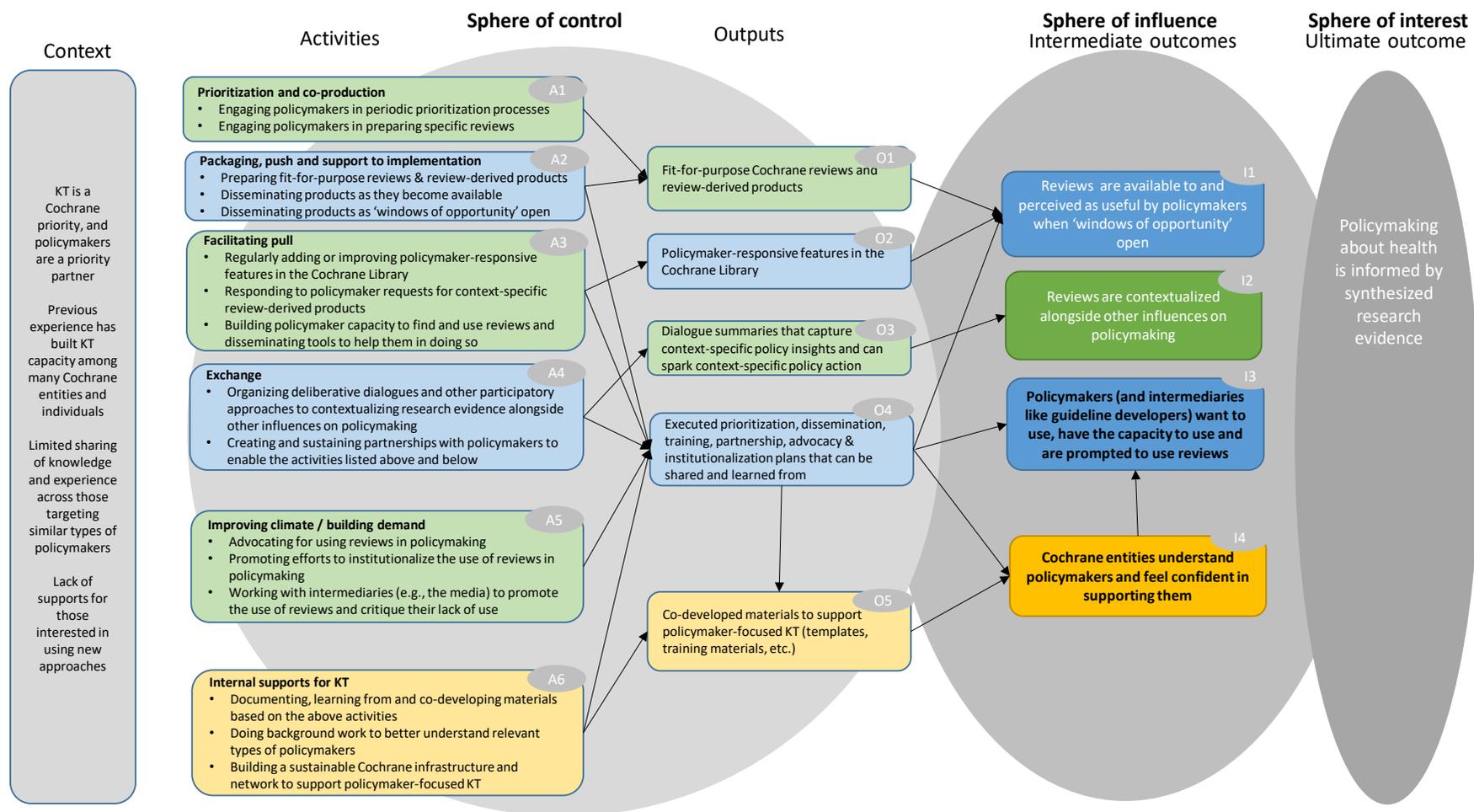
The project team will report directly into Cochrane's Knowledge Translation Department and indirectly to the KT Advisory Group. The appointed project manager from the successful tender will be required to provide a verbal update on progress against key milestones every two weeks. A one-page summary of the project will be required monthly or at the request of the KT Advisory Group.

10 Submission Requirements

Process for submission   Submissions must be in the form of a succinct Word or pdf document containing:

- **Executive summary**
- **Project Lead**: contact details and affiliations of who will be the main contact for the project
- **Objectives:** Details on how they propose to achieve each of the objectives.
- **Project team members:** Details of the team who will be contributing to the work including; who, how many people will be contributing and for what proportion of their time? Expertise and capacity of project team should also be included in the form of a short biography of each of the individuals involved.
- **Project plan:** A proposed project plan including key milestones for deliverables and the responsibilities for each stage.
- **Timeline:** The project plan should include dates for the delivery of key components.
- **Risk assessment:** A consideration of the potential roadblocks or issues that might affect the project and how the risks could be minimized.
- **Budget:** The budget required for the project and a breakdown of those costs by activity.

Process   All applications should be sent via email to Jo Anthony, Head of Knowledge Translation, janthony@cochrane.org by **Thursday 31st October 2019, 17:00.**

All submissions will be acknowledged by email:

- The selection committee consisting of KT Advisors will review the applications within two weeks.
- Shortlisted applications will be invited for discussions **November 2019**
- The successful applicant will be informed by **end November 2019**
- The unsuccessful applicants will be informed by **end December 2019**

Deadline for Submission: The deadline for applications is **Thursday 31st October 2019, 17:00 GMT.**

Other information   If you have any questions or require more information, please contact Jo Anthony, Head of Knowledge Translation janthony@cochrane.org or Karen Head, Knowledge Translation Project Manager (khead@cochrane.org).

The process for commissioning will follow the 'Process for commissioning Knowledge Translation Implementation Work'

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Appendix A – Draft Theory of Change for Policymakers

Sphere of control

Sphere of influence
Intermediate outcomes

Sphere of interest
Ultimate outcome

Context

Activities

Outputs

Context

KT is a Cochrane priority, and policymakers are a priority partner

Previous experience has built KT capacity among many Cochrane entities and individuals

Limited sharing of knowledge and experience across those targeting similar types of policymakers

Lack of supports for those interested in using new approaches

Activities

A1 — Prioritization and co-production
- Engaging policymakers in periodic prioritization processes
- Engaging policymakers in preparing specific reviews

A2 — Packaging, push and support to implementation
- Preparing fit-for-purpose reviews & review-derived products
- Disseminating products as they become available
- Disseminating products as 'windows of opportunity' open

A3 — Facilitating pull
- Regularly adding or improving policymaker-responsive features in the Cochrane Library
- Responding to policymaker requests for context-specific review-derived products
- Building policymaker capacity to find and use reviews and disseminating tools to help them in doing so

A4 — Exchange
- Organizing deliberative dialogues and other participatory approaches to contextualizing research evidence alongside other influences on policymaking
- Creating and sustaining partnerships with policymakers to enable the activities listed above and below

A5 — Improving climate / building demand
- Advocating for using reviews in policymaking
- Promoting efforts to institutionalize the use of reviews in policymaking
- Working with intermediaries (e.g., the media) to promote the use of reviews and critique their lack of use

A6 — Internal supports for KT
- Documenting, learning from and co-developing materials based on the above activities
- Doing background work to better understand relevant types of policymakers
- Building a sustainable Cochrane infrastructure and network to support policymaker-focused KT

Outputs

O1 — Fit-for-purpose Cochrane reviews and review-derived products

O2 — Policymaker-responsive features in the Cochrane Library

O3 — Dialogue summaries that capture context-specific policy insights and can spark context-specific policy action

O4 — Executed prioritization, dissemination, training, partnership, advocacy & institutionalization plans that can be shared and learned from

O5 — Co-developed materials to support policymaker-focused KT (templates, training materials, etc.)

Intermediate outcomes

I1 — Reviews are available to and perceived as useful by policymakers when 'windows of opportunity' open

I2 — Reviews are contextualized alongside other influences on policymaking

I3 — Policymakers (and intermediaries like guideline developers) want to use, have the capacity to use and are prompted to use reviews

I4 — Cochrane entities understand policymakers and feel confident in supporting them

Ultimate outcome

Policymaking about health is informed by synthesized research evidence

END

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