

Process for commissioning Knowledge Translation implementation work

Special Projects

Background

Cochrane defines Knowledge Translation (KT) as the process of supporting the use of health evidence from our high quality, trusted Cochrane systematic reviews by those who need it to make health decisions. Cochrane recognises that helping different target audiences to understand and use the evidence it produces is important, and so has developed a [KT Framework](#) which defines the scope of Cochrane's KT efforts and guides work and investment.

To help identify which work to prioritize, Cochrane developed a [KT Implementation Plan](#), which establishes a number of Working Groups (WG). Each Working Group is made up from members from the Cochrane Community (along with external members) who have experience, knowledge and/or interest in the topic area. The Working Groups identify how best to support the implementation of the KT framework, which may include the development of resources and tools such as guidance, templates and training. Some of these outputs may be developed by the Working Group themselves, supported by the Cochrane Knowledge Translation Department (KTD) as part of Cochrane's Central Executive Team. However, there are some projects which will require a greater investment of resources and/or specialist KT skills than can be provided on a voluntary basis within the Working Group or are available within the KT department.

For these specific projects, we recognize that there may be people in Cochrane who have the technical skills, organisational understanding and KT expertise relevant to the required project. It is therefore proposed that these projects will be commissioned within the Cochrane Community as centrally-funded pieces of work. Engaging groups from the Cochrane Community has advantages in producing content that meets the needs of the community and those of specific KT audiences, as defined in the KT Framework, and in supporting the Community.

As Working Groups members have a strong knowledge and interest in KT, it is expected that some may be interested in tendering for these potential commissioned projects. Therefore, care needs to be taken to avoid potential conflicts of interest with Working Group members both in defining the project requirements and then subsequently tendering for the piece of work. It is important that a clear process and criteria are established to ensure that the process is transparent and fair.

Purpose of this document

This document aims to set out the process for commissioning any funded, commissioned projects relevant to the implementation of Cochrane's Knowledge Translation Framework,

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within the Cochrane Community. This includes identifying the role of KT Working Group or KT Advisory Group members who may wish to submit a bid to complete the designated work.

The process is intended only for projects with an identified need within the implementation of the agreed KT framework (i.e. for projects which are demand driven). It is not intended to serve as a call for funding for KT projects outside the scope of the implementation of the Cochrane KT Framework.

Outline of the Process

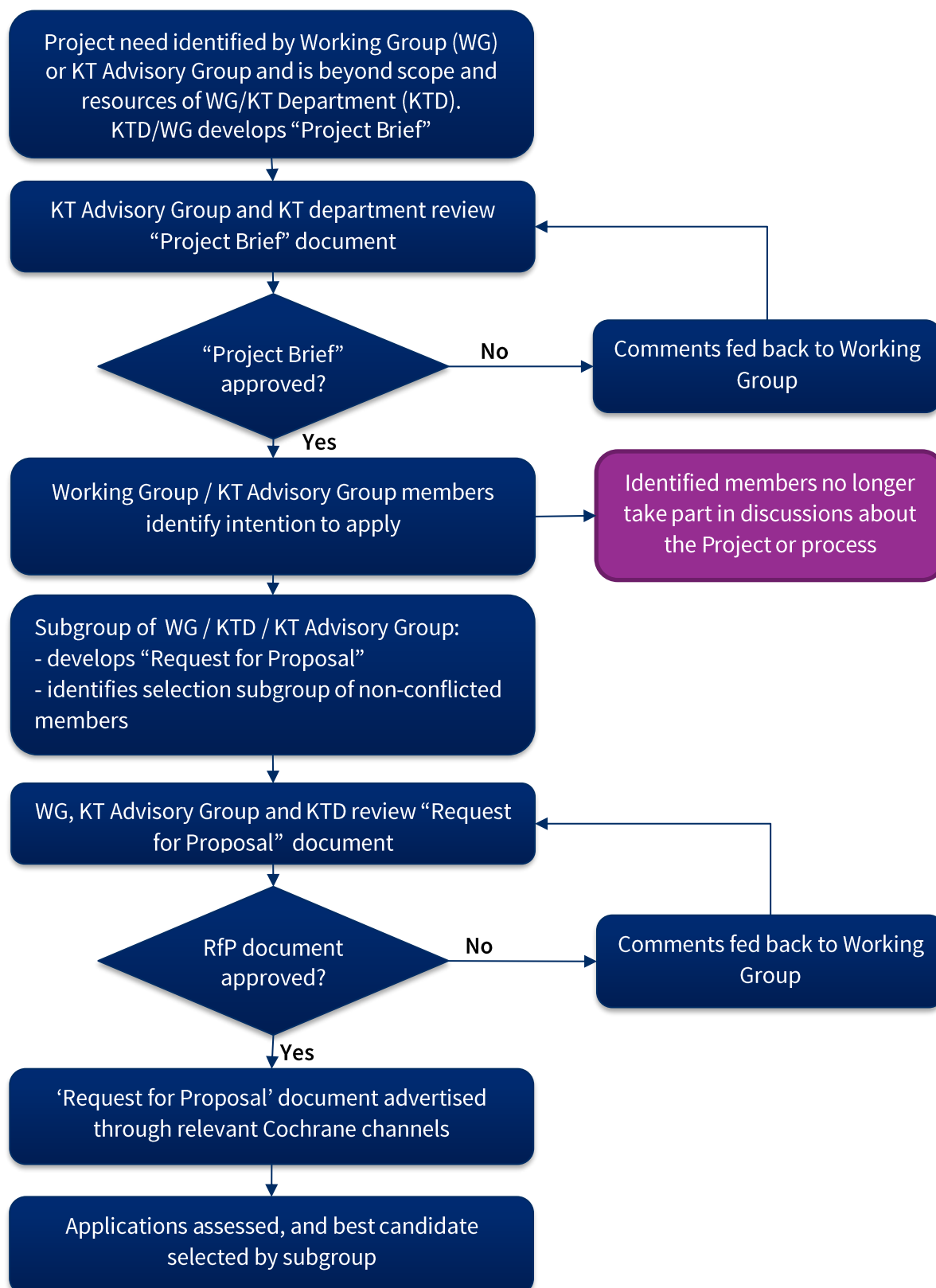


Figure 1. Process diagram for Commissioning Knowledge Translation Work

Process Description

All possible projects identified by the Working Groups, or submitted to the KT department for consideration, should be reviewed by at least two members of the KT Advisory Group at an early stage. The projects should be considered with regards to:

- Complexity: the number of multiple internal and/or external stakeholders, or interdependencies with other Cochrane Work Plans or Cochrane Groups.
- Timeframe: projects with longer timeframes may be referred
- Expected budget: all projects with an expected budget of over £10K will be referred.

For smaller, simple, low budget projects or when there is adequate internal skill and capacity (such as the analysis of the Product survey), the KT department will be responsible for the management of these projects and the following process does not apply.

1. Development of the “Project Brief”

The need for a project is identified either by the Working Group, through the KT Advisory Group, or submitted through an external source. Where there is a relevant Working Group they will discuss the project. If there is no directly relevant Working Group, or the project spans working groups, the KT Advisory Group will discuss the project.

If, during the discussions about the project it is identified that the scope of the work is likely to be bigger than can be completed by the resources of the Working Group of the Knowledge Translation department alone. They suggest that the wider Cochrane community should be engaged to determine if there are groups who may be interested in completing the project. The Working Group or KT department should develop a “Project Brief” document which establishes the basic details of the project (see Appendix A for contents of the Project Brief). All members of the Working Group are involved in these discussions.

2. Review of the Project Brief by the Advisory Group

The draft Project Brief can be submitted to the KT department or KT Advisory Group at any stage. The KT Department and KT Advisory Group will provide timely feedback on the document. Once all parties are happy with the contents of the document they can approve it, allowing it to progress to the next step. All KT Advisory Group members can be involved in this discussion. The estimated budget must be approved by KT department.

3. Identification and withdrawal of members interested in bidding for work

Working Group or KT Advisory Group members who think that they as individuals, or any of the groups to which they are affiliated, may be interested in tendering for the piece of work identified in the ‘Project Brief’ are formally asked to identify themselves within an agreed time-frame. This process is documented by KT Department (KTD) and these members agree to withdraw from further discussions on this topic until the selection process has been completed. Where the topic area appears in future meetings, potentially conflicted members must not be present for those discussions, and this should be documented in the minutes.

4. Development of the ‘Request for Proposal’ document

A subgroup of unconflicted members of the Working Group, KT Advisory Group and KT Department, should convert the ‘Project Brief’ into an ‘Request for Proposal’ document. This document will include specific criteria against which the applications will be assessed. Appendix B presents the suggested contents of the document. The draft versions of the ‘Request for

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Proposal' documents should be stored securely and should not be distributed to the members who have expressed an interest in bidding for the work, until it is advertised in step 7.

5. Identification of a selection subgroup

Where a project will go out for a tender process, a selection subgroup should be established who will be responsible for reading and assessing the applications received in response to the 'Request for Proposal' document. They will be responsible for selecting the successful application:

- Two unconflicted members of the Working Group
- One member of the KT Department
- For projects referred to the KT Advisory Group: Two unconflicted members of the KT Advisory Group

6. Review of the 'Request for Proposal' document by the KT Advisory Group

The 'Request for Proposal' document can be submitted at any stage to the KT department and KT Advisory Group members who have not declared themselves as interested in applying in step 3. The KT department and KT Advisory Group will provide timely feedback on the document which should be considered by the Working Group. Once the KT Advisory Group are happy with the contents of the document they can approve it.

7. Advertising 'Request for Proposal' document

Once the 'Request for Proposal' document has been approved it can be advertised on the Cochrane Community websites. The document will be advertised in the relevant Cochrane digests and details will be sent via email to all Advisory Group and to members of all Working Groups.

8. Receipt of responses

When the responses from the 'Request for Proposal' document are received they should be treated as confidential and only the members of the selection subgroup (along with administrative support from the KT department) should have access to them.

9. Assessment of responses

The subgroup identified in step 5 will be responsible for reviewing all of the submitted responses and evaluating them against the agreed criteria given in the 'Request for Proposal' document. These assessments should be documented. The subgroup will select the bid which best meets the criteria and will work with them to ensure that the contacts are signed.

The subgroup will be responsible for providing feedback to unsuccessful bids.

Appendix A – Suggested Contents of Project Brief Document

Note: This document should be written by the Working Group (all members) and should provide an outline of the project, along with an estimate budget and timeline for the work.

Background

Why is the project being undertaken, what is the identified need?

Aim of the Work

What is the aim of the project and how does this contribute to the wider KT Framework and associated themes.

Project Objectives

What are you expecting to be delivered as part of the project? (who is the KT target audience for any outputs).

Project Description

Provide an outline of the work to be completed,

Project Approach

Provide an outline of what you would expect the approach to the problem to be.

Key dates

When should the project start and when would you expect the outputs to be delivered?

Internal Stakeholders/ Dependencies

Are there any internal stakeholders or who should be kept included in the project? Are there any dependencies for this work?

Evaluation

What are the metrics by which this project shall be evaluated?

Estimated budget allocation

How much is the project expected to cost.

Appendix B – Suggested Contents of the ‘Request for Proposal’ Document

Note: This document should be written by a subgroup of Working Group members, KT Advisory and KT Department members who have not expressed an interest in tendering for the work. The document will be posted on the website as the advertisement for tendering. The ‘Submission Requirements’ section sets out what information the applicants should provide when they reply to the ‘Request for Proposal’ document.

Further information may need to be included in the document based on the details of the tendered work. It may be helpful to refer to the standard tender documents <https://www.dropbox.com/sh/l5qdca6r7on6zgf/AAB2epEVlhT5x6Ej4uOHOfJma?dl=0> for other possible elements and evaluation criteria that can be used.

Background

Why is the project being undertaken, what is the identified need?

Aim

What is the overall aim of the project

Objectives

SMART objectives – specific, measurable, achievable, realistic, timely

Scope of work

What would we be expecting the successful application to do?

Deliverables

List of deliverables that are expected as a result of the project – e.g. documentation, training courses, report requirements if known.

Methodology

To include if there is there a specific methodology that we would like applicants to follow. If we are asking applicants to propose a methodology, we need to make this clear too.

Timelines

What are the timelines we expect for the work to be started and what is the final deadline? Are there any other known milestones (e.g. governance meetings etc)?

Budget

Is there a maximum budget that the submissions must not exceed?

Competency and Expertise Requirements

What is the expected expertise of the team who will be working on the project? The expectation that a single point contact ‘project owner’ should be identified.

Evaluation Criteria

What criteria will the applications be measured against?

Reporting requirements

During the project what the line of reporting will be. Are there any interim reports required to update progress?

Submission Requirements

Process for submission	<p>Submissions must be less than x pages long and should include:</p> <ul style="list-style-type: none">• Executive summary• Details and affiliations of who will be the project owner for the work and contact details• Explanation of how this project will fit into their existing Cochrane work, or justification that it won't impact their current Cochrane work• Details on how they propose that the objectives will be achieved• Details of the team who will be contributing to the work, how many people for what proportion of their time, what expertise and competence do they have? (do you want biographies, how long for each person)• A proposed project plan/timeline, including key milestones for the expected date for deliverables• Any potential roadblocks or issues that might affect the project• The budget required for the project and a breakdown of those costs by activity.
Process	<p>All applications should be sent via email to xxx (telephone number) by (add date/time)</p> <p>All submissions will be acknowledged by email:</p> <ul style="list-style-type: none">• The selection committee will review the applications in (week)• The successful applicant will be informed (week)• The unsuccessful applicants will be informed (week)
Deadline for Submission:	<p>The deadline for applications is Time (with time-zone) and date. A decision will be made by xxx</p>
Other information	<p>If you have any queries, please contact KTD 9add name and contact details)</p>

**From the Knowledge Translation Advisory Group
Knowledge Translation Department
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