While we wait for others to join, please introduce yourself in the chat by entering your name, affiliation, country of residence, and why you joined this webinar.
WELCOME FROM DR. EMMANUELLA DELVA

Acting Managing Director, Research Division
Deputy Director for Research Policy, Research Division
Innovation, Technology, & Research Hub (ITR)
USAID | Development, Democracy, and Innovation
In your experience, what factors influence research uptake?
OVERVIEW OF THE RESEARCH TRANSLATION TOOLKIT
The Research Translation Toolkit is a comprehensive, standalone resource that can be used by anyone who wants to bridge the gap between research production and research utilization.

Each section includes exercises, fillable forms, and templates to help you apply the information in the toolkit to your own work.
ONE TOOLKIT, THREE SECTIONS

SECTION 1
Stakeholder Analysis

SECTION 2
Communication Products

SECTION 3
Research-to-Action (R2A) Plan

When used together, these three sections can help you craft strategies and messages to influence decisions and achieve development impact more effectively throughout the research process.
TOOLKIT SECTIONS ARE USEFUL AT CRITICAL STAGES IN THE RESEARCH PROCESS
USING THE TOOLKIT IN REAL-WORLD SCENARIOS
SUCCESSFUL STAKEHOLDER ANALYSIS

IMPROVING DIAGNOSIS AND TREATMENT OF CUTANEOUS LEISHMANIASIS IN TUNISIA

Brainstormed and identified an initial set of 20 diverse stakeholders, from subnational to global levels.
SUCCESSFUL STAKEHOLDER ANALYSIS

IMPROVING DIAGNOSIS AND TREATMENT OF CUTANEOUS LEISHMANIASIS IN TUNISIA

Prioritized according to high level of influence and/or capacity to support "quick win."
SUCCESSFUL COMMUNICATION PRODUCTS

CHILDHOOD TUBERCULOSIS IN THE PHILIPPINES

Analyzed data

Identified barriers

Identified decisionmakers at national and subnational levels

Developed clear recommendations related to guidance, resources, and tools

Determined stakeholders’ communication preferences

Packaged findings in a factsheet
SUCCESSFUL R2A PLANNING
IMPROVING CROP STORAGE IN INDIA

• Research team set R2A goals focused on reaching national and subnational stakeholders.

• Identified several immediate, actionable next steps to work toward these goals.
STAKEHOLDER ANALYSIS SECTION

SECTION 1
Stakeholder Analysis

SECTION 2
Communication Products

SECTION 3
Research-to-Action (R2A) Plan
STAKEHOLDER ANALYSIS SECTION

IDENTIFY AND ENGAGE

The Stakeholder Analysis section can help you identify influential individuals or groups who might use your research and plan effective engagement with them.

This will increase the impact of your research insights or technical innovations.
STAKEHOLDER ANALYSIS SECTION

WHEN TO USE

Use this section when you want to:

• Understand your stakeholders’ interests, influences, motivations, and knowledge of the subject matter.

• Determine which stakeholders are most important to engage in the research process, and when and how to engage them.

• Learn tips for how to interview stakeholders.
STEP-BY-STEP GUIDE

STEP 1: Identify Stakeholders
• Worksheet 1: Stakeholder Identification

STEP 2: Prioritize Stakeholders
• Worksheet 2a: Stakeholder Prioritization
• Worksheet 2b: Stakeholder Mapping Matrix (optional)

STEP 3: Understand Stakeholders
• Worksheet 3: Stakeholder Information
• Resource: Stakeholder Interview Guide

STEP 4: Plan Stakeholder Engagement
• Worksheet 4: Stakeholder Engagement Plan by Project Stage
• Template: Short-Term Stakeholder Engagement Plan
• Example: Short-Term Stakeholder Engagement Plan

STEP 5: Track Stakeholder Engagement
• Worksheet 5: Stakeholder Engagement Tracking Plan
STAKEHOLDER ANALYSIS SECTION

HANDS-ON TOOLS

WORKSHEET | RESEARCH TRANSLATION TOOLKIT
STEP 3: STAKEHOLDER INFORMATION

<table>
<thead>
<tr>
<th>STAKEHOLDER</th>
<th>UNDERSTANDING KEY CHARACTERISTICS</th>
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<tbody>
<tr>
<td>Group/Individual</td>
<td>Level of Influence</td>
</tr>
<tr>
<td>Group/Individual</td>
<td>Level of Influence</td>
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WORKSHEET | RESEARCH TRANSLATION TOOLKIT
STEP 2A: STAKEHOLDER PRIORITIZATION

<table>
<thead>
<tr>
<th>STAKEHOLDER</th>
<th>STAKEHOLDER TYPE</th>
</tr>
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<tbody>
<tr>
<td>Group/Individual</td>
<td>Level of Influence</td>
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<tr>
<td>Group/Individual</td>
<td>Level of Influence</td>
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</table>

TIP SHEET | RESEARCH TRANSLATION TOOLKIT
STAKEHOLDER INTERVIEW GUIDE

Table of Contents
A. Scheduling Interviews
B. Preparing for the Interview
C. Conducting Interviews
D. Analyzing Interview Results
Annex 1: Sample Script for Introduction and Conclusion
Annex 2: Sample Questions on Research Utilization

Introduction
This interview guide describes the process a research team can use to interview key stakeholders as part of the stakeholder analysis. It includes scheduling interviews, preparing interview tools, conducting interviews, and analyzing interview results.

A. Scheduling Interviews

1. Send an Email Invitation.
   Once you have identified your stakeholders, send an email invitation—usually a brief letter includes information about your project, organization, and any additional information you think the stakeholder may want to know about your research. Include a call to action at the end of the letter, highlighting what sort of information you will require during the interview and how the information will be used.

2. Call to Schedule the Interview.
   After a reasonable amount of time, call each key stakeholder to schedule an interview. Introduce yourself and briefly review the information you included in your email. Make an appointment to interview the stakeholder at a convenient time using the contact information you have. During the call, ask questions about their availability for the interview and remind them that they will be contacted again by phone to set up the interview.

B. Preparing for the Interview

1. Read the Stakeholder Profile.
   Review the stakeholder profile to ensure you understand the key details about the stakeholder. This will help you prepare questions that are relevant to the interview.

2. Prepare Interview Tools.
   Prepare the interview tools you need to conduct the interview. This may include an interview guide, a checklist of key points to cover, and any other materials that may be necessary.

C. Conducting Interviews

1. Conduct the Interview.
   During the interview, ask open-ended questions to encourage the stakeholder to share their thoughts and experiences. Make sure to listen actively and provide feedback on their responses.

D. Analyzing Interview Results

1. Analyze the Data.
   Review the interview notes and transcribe any key points. Use a codebook or coding software to help you identify patterns and themes in the data.

2. Summarize the Findings.
   Write a summary of the key findings from the interview. This will help you identify areas where further research is needed and how the research can be used to inform policy decisions.

Adapted from the Policy Communication Toolkit by PRB.
STAKEHOLDER ANALYSIS SECTION

USEFUL ACROSS THE RESEARCH PROCESS

Use this section as early as possible so stakeholders can be engaged to give their input before your research questions and/or approach are finalized.

Use this section at any stage of your research project because stakeholder roles may vary at each stage; engagement is an ongoing, iterative process that continues through the project.
COMMUNICATION PRODUCTS SECTION

SECTION 1
Stakeholder Analysis

SECTION 2
Communication Products

SECTION 3
Research-to-Action (R2A) Plan
The Communication Products Section will help you craft main messages and choose the right format to share your research insights or technical innovations with stakeholders in a way that motivates them to use your evidence to inform policies, programs, or practices.
COMMUNICATION PRODUCTS SECTION

WHEN TO USE

Use this section when you want to:

• Tell a story using your data and information.
• Tailor your main messages to your audiences’ interests.
• Package your research results in the format that is most likely to capture your stakeholders’ attention so the results will be used.
Step 1: Identify Communication Objectives
  • Worksheet: *Communication Objectives and Audiences*

Step 2: Identify Audiences
  • Worksheet: *Communication Objectives and Audiences*

Step 3: Identify Main Messages
  • Worksheet: *How to Craft Main Messages*

Step 4: Use Accessible Language
  • Tip Sheet: *Tips and Tricks for Writing Accessibly*

Step 5: Identify Resources and Develop the Product
  • Tip Sheet: *Timeline and Budget Considerations*
  • Example Fact Sheet: *Contact Tracing*
  • Example Fact Sheet: *Educating Moroccan Youth*
  • Example Policy Brief: *Damming the Ecosystems of Amazonia*
  • Example Policy Brief: *Sharing the Land*
  • Worksheet: *Communication Product Outline for Fact Sheets and Policy Briefs*
  • Template: *Fact Sheet*
  • Template: *Policy Brief*
  • Checklist: *Developing a Communication Product*
  • Tip Sheet: *Types of Communications Professionals*
### COMMUNICATION PRODUCT SECTION

### HANDS-ON TOOLS

#### WORKSHEET | COMMUNICATION OBJECTIVES AND AUDIENCES

<table>
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<table>
<thead>
<tr>
<th>AUDIENCE</th>
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<tbody>
<tr>
<td>Who are they?</td>
</tr>
<tr>
<td>What do they know about it?</td>
</tr>
<tr>
<td>Primary</td>
</tr>
<tr>
<td>Secondary</td>
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</tbody>
</table>

#### WORKSHEET | RESEARCH TRANSLATION TOOLKIT

**HOW TO CRAFT MAIN MESSAGES**

**Findings, Implications, and Recommendations**

Your audience should be able to easily understand what you want them to learn or takeaway from your research by defining the main message of each section of your communication product (findings, implications, and recommendations).

Think about the most relevant findings of the outcomes you want to convey to your intended audience in your communication. The following template is a good tool for assisting:

- Identify key findings, or program-related findings or data and list them using a succinct bullet format. Use continuation page if you have more than three:
  -
  -
  -

- Given your key findings, what are the corresponding policy and program implications for your audience to consider? Use continuation page if you have more than three:
  -
  -

#### WORKSHEET | RESEARCH TRANSLATION TOOLKIT

**COMMUNICATION PRODUCT OUTLINE FOR FACT SHEETS AND POLICY BRIEFS**

This worksheet will walk you through the information you need to produce a product outline. Completing each of the sections below will help you identify audience and communication objectives and draft main messages (remember to use accessible language).

1. **Product Type** (fact sheet or policy brief):
   -

2. **Length** (Fact sheets are between 600-800 words; policy briefs are a maximum of 1,200 words):
   -

3. **Look and Feel** (colors, fonts, format for titles, graphics, and logos follow institutional guidelines; if no guidelines exist, choose based on appeal to the audience):
   -

4. **Primary Audience** (your core audience):
   -

5. **Secondary Audience** (other important audiences):
   -
It is best to use this section when you have sufficient data to support your claims; clear results; and actionable, evidence-based recommendations.
RESEARCH-TO-ACTION (R2A) PLAN SECTION

SECTION 1
Stakeholder Analysis

SECTION 2
Communication Products

SECTION 3
Research-to-Action (R2A) Plan
R2A PLAN SECTION

PREPARING FOR ACTION

The R2A Plan section helps you develop a step-by-step plan to communicate your research findings, attract influential stakeholders, and ensure your research leads to action.

You should revisit and update your R2A plan over time.
R2A PLAN SECTION

WHEN TO USE

Use this section when you want to:

• Leverage your stakeholder analysis and communication products.

• Identify the types of changes or decisions that could be made based on your research evidence.

• Ensure your messages are clearly communicated, compelling, and credible to your audience.

• Identify opportunities to highlight your research findings and generate interest in their use.
STEP-BY-STEP GUIDE

STEP 1a: Set Research-to-Action Goals
  • R2A Plan Template: Box 1a

STEP 1b: Summarize Major Project Results
  • R2A Plan Template: Box 1b

STEP 2: Stakeholder Analysis—Identify, Prioritize and Engage
  • R2A Plan Template: Box 2a and Box 2b

STEP 3: Assess the Policy Environment
  • R2A Plan Template: Box 3

STEP 4: Distill Main Messages and Develop Actionable Recommendations
  • R2A Plan Template: Box 4a and Box 4b

STEP 5: Package Research in User-Friendly Formats and Disseminate
  • R2A Plan Template: Box 5a and Box 5b

STEP 6: Develop an R2A Plan Timeline and Checklist
  • R2A Plan Template
  • R2A Checklist
  • R2A Timeline Worksheet
  • R2A Timeline Example

Step 7: Regularly Track Progress and Measure Success
  • R2A Plan Template
  • R2A Progress Tracking Worksheet
## R2A Plan Section

### Hands-on Tools

#### Worksheet Research-to-Action Plan Template

| R2A Goals | Stakeholders | Step 1: Collect Main Messages and 
|           |              | Package Research in Appro 
|           |              | Disseminate

1. **Goal 1:**

   **R2A Goals**

   List one or two primary R2A goals. You can refine them as needed, but we recommend finalizing the goals before moving on to the next step in the R2A Plan process. We recommend that you list only the location of goals that you can register progress on the next one to two years.

   **Goal 1:**

   **Stakeholders**

   **Instructions:** Identify the names, titles, organizations, and the key themes with which you would like to engage in the next step of the R2A Plan process. Each R2A goal requires a main research.

   1. **Name:**
      - Organization:
      - Reference:
   2. **Name:**
      - Organization:
      - Reference:
   3. **Name:**
      - Organization:
      - Reference:

   **Step 1: Collect Main Messages and Package Research in Appro Disseminate**

   Think carefully about which main product formats will be most helpful to the clients. A 21 of the R2A Plan section is the basis of further research.

   **Box 4: Identify Your R2A Goals | Findings**

   What is the problem? What are the key findings? What are the solutions, and factors that will ensure that your goal is achieved?

   1. **Name:**
      - Organization:
      - Reference:
   2. **Name:**
      - Organization:
      - Reference:
   3. **Name:**
      - Organization:
      - Reference:

   **Implications**

   What are the implications of the findings and why are they important? How do they contribute to the strategy?

   1. **Name:**
     - Organization:
     - Reference:
   2. **Name:**
     - Organization:
     - Reference:
   3. **Name:**
     - Organization:
     - Reference:

   **Primary Research Products**

   Identify any other research findings you expect to present as the basis for non-user-friendly print or digital products. Fill in the planning process.

   **Box 5: Disseminate Main Messages and Products Through Multiple Channels**

   Think about how you will share your messages and products through specific channels to reach your targeted audience.

   **Audience**

   - [ ] General public
   - [ ] Scientific community
   - [ ] Media
   - [ ] Stakeholders
   - [ ] Administrative/literature

   **Type of Dissemination**

   - [ ] Printer
   - [ ] Online
   - [ ] Newsletter
   - [ ] Social media

   **Reach**

   - [ ] Conference and Events
     - [ ] Conference
     - [ ] Conference call
   - [ ] Project Organized Virtual or in Person Events
     - [ ] Website
     - [ ] Social media campaigns
   - [ ] Digital Dissemination
     - [ ] Website
     - [ ] Social media campaigns
   - [ ] Media
     - [ ] Newsletter
     - [ ] Social media campaigns

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R2A PLAN SECTION

USEFUL ACROSS THE RESEARCH PROCESS

R2A PLAN

Use this section as you begin planning your research to help you think about how you want your results to be used and how to involve/inform stakeholders throughout the research process.

01 Research question development

02 Concept and proposal write-up

03 Study implementation

04 Analysis and write-up

05 Dissemination and follow-up

R2A PLAN

Use this section to assess your results, determine who needs to hear about them, and develop a plan to convey significant implications to these stakeholders.
TYING IT ALL TOGETHER

**STAKEHOLDER ANALYSIS**
Use this section as early as possible so stakeholders can be engaged to give their input before your research questions and/or approach are finalized.

**R2A PLAN**
Use this section as you begin planning your research to help you think about how you want your results to be used and how to involve/inform stakeholders throughout the research process.

**COMMUNICATIONS PRODUCTS**
It is best to use this section when you have sufficient data to support your claims, clear results; and actionable, evidence-based recommendations.

**R2A PLAN**
Use this section to assess your results, determine who needs to hear about them, and develop a plan to convey significant implications to these stakeholders.

---

**Research question development**

**Concept and proposal write-up**

**Study implementation**

**Analysis and write-up**

**Dissemination and follow-up**

---

**STAKEHOLDER ANALYSIS**
Use this section at any stage of your research project because stakeholder roles may differ at each stage; engagement is an ongoing, iterative process that continues throughout the project.
A VITAL RESOURCE FOR RESEARCHERS

THE RESEARCH TRANSLATION TOOLKIT

Research can change the world—but only when it is communicated effectively to those who can improve programs and policies.

USAID’s Research Technical Assistance Center has developed a participatory Research Translation Toolkit that helps you communicate your research findings effectively, so the right people learn about them at the right time for informed decision making. Exercises, fillable forms, templates, and other resources walk you through how to effectively influence key decisions and achieve development impact.

Each Toolkit section guides you through a series of steps to engage with stakeholders throughout the research process and beyond.

**Communication Products Section**
Craft main messages and choose the right format to share your research insights or technical innovations with stakeholders in a way that motivates them to use evidence to inform policies, programs, or practices.

**Stakeholder Analysis Section**
Identify influential individuals or groups who might use your research, and plan effective engagement with them to increase the impact of your research insights or technical innovations.

**Research-To-Action (R2A) Plan Section**
Develop a step-by-step plan to communicate your research findings, attract influential stakeholders, and ensure your research leads to action. You should revisit and update your R2A plan over time.

**USE IF YOU WANT TO:**
- Use your data and information to tell a story.
- Tailor your main messages to your audience’s interests.
- Package your research results in the format that is most likely to capture your stakeholders’ attention so the results will be used (e.g., fact sheets, policy briefs, infographics, presentations, etc.).

**USE IF YOU WANT TO:**
- Understand your stakeholders’ interests, influence, motivation, and knowledge of the subject matter.
- Determine which stakeholders are most important to engage in the research process, and when and how to engage them.
- Learn tips for how to interview stakeholders.

**USE IF YOU WANT TO:**
- Create a strategic plan to leverage your Stakeholder Analysis and Communication Products.
- Identify the types of changes or decisions that could be made based on your research evidence.
- Ensure your messages are clearly communicated, compelling, and credible to your audience.
- Identify opportunities to highlight your research findings and generate interest in their use.
VIDEO: ACCESSING THE TOOLKIT
QUESTIONS?

ANSWERS!
AUDIENCE ACTIVITY RESULTS

HOW WILL YOU USE THE TOOLKIT IN YOUR OWN WORK?

• I have used the R2A to build my next consortium program in Africa.
• Produce dissemination materials that are accessible and relevant to the audiences we want to target. To figure out how to convey stories they identify themselves (at least with their interests).
• Tailoring message to different stakeholders.
• As our five-year program is ending soon, this toolkit will be very useful to disseminate the most important results.
• Applying technical results to stakeholders
• Determining what kinds of changes/decisions we should make based on the findings.
• Our work in Jordan is mainly towards agriculture technology transfer. We work with international partners from the US and Europe to transfer their technologies to Jordan. Therefore, we are looking for such a toolkit to explain sophisticated technology to farmers and policy makers.
• By introducing the Toolkit to researchers who are beginning their research co-creation process along with stakeholders and counterparts.
• Help to streamline and prioritize engagement activities on USAID projects, as well as projects across the organization that may have less external guidance.
• To figure out how talk to the people who could use my research
• To produce diverse products to communicate our research findings, also to design products for different audiences and countries in Central American and the Caribbean.
AUDIENCE ACTIVITY RESULTS

HOW WILL YOU USE THE TOOLKIT IN YOUR OWN WORK?

• Identify clearly what information can be gained from research coming out or our programs and how it can be used to better future processes.
• Tailor messages to different key audiences.
• I am especially interested in applying the Communication Products section to my work to figure out the best formats to use for specific audiences and purposes.
• Make program evaluation findings more accessible and action-oriented to implementers, USAID, and government counterparts.
• It helps identify policy solutions that are technically correct, politically feasible, and organizationally implementable.
• More reflection on stakeholders, this knowledge should not be taken for granted.
• Learning an effective communication for local stakeholders.
• Already using it in my own work.
• We want to convey the impact of our program over the past 10 years.
• I am already using material produced with you / Cutaneous leish project :)
WE WANT TO HEAR FROM YOU!

Share your story about how using the **Research Translation Toolkit** has influenced uptake of your research by emailing us at itr.researchfeedback@usaid.gov.
UPCOMING WEBINARS 2023

● **February 23**: Reaching the Right People at the Right Time: How to Use the Stakeholder Analysis Section

● **March 2**: Capturing Attention: How to Use the Communication Products Section

● **March 9**: Transforming Research Into Programs and Policies: How to Use the Research-to-Action Section

*All 9:30 - 11:00 am (Eastern Time)*
THANK YOU!

Register for the next webinars and access post-event resources via the webinar website: https://www.rtachesn.org/stories-and-news/research-translation-toolkit-webinars/
Acknowledgements

This presentation was produced by Population Reference Bureau under the Research Technical Assistance Center (RTAC) project. RTAC is made possible by the generous support of the American people through the United States Agency for International Development (USAID) under the terms of contract no. 7200AA18C00057. The contents are the sole responsibility of RTAC and NORC at the University of Chicago and do not necessarily reflect the views of USAID or the United States government.