



# Knowledge Translation Best Practices

## Background

This white paper is a collaborative effort of the United States Agency for International Development (USAID) Biodiversity Division and its implementing partners. The goal is to compile and share experiences and best practices related to knowledge translation—the distillation and sharing of knowledge so it is relevant to other practitioners as users—in USAID programming and to support USAID staff, technical assistance providers, and implementing partners in applying these best practices to biodiversity activities. The inspiration and basis for this paper is a desk review of knowledge translation produced by Linda Keuntje of USAID’s Targeting Natural Resource Corruption activity in response to one of the activity’s learning questions: What factors commonly enable or limit changes to practice based on new information such as new research or tailored information products?

## Why Knowledge Translation?

USAID and its implementing partners design and implement biodiversity conservation activities in more than 60 countries. These activities generate a growing body of knowledge in the form of research findings, reports, and studies. Evidence shows that knowledge sharing is positively related to reduced production costs, faster completion of projects, and improved team performance.<sup>1</sup> Prioritizing the distillation and sharing of knowledge through knowledge translation can help ensure useful information reaches the people who need it at the right time and in a format they can use to inform current and future biodiversity conservation programming. USAID developed a [Research Translation Toolkit](#) in 2021 to support researchers in applying best practices to their translation and dissemination efforts. This paper is meant to serve as a complement to that toolkit to support authors of the various types of knowledge products USAID develops.

## Planning for Knowledge Translation

A clear purpose for how knowledge will be used and common understanding of the target audience are foundational elements of planning knowledge products. When scoping a knowledge product, USAID considers the audience and its needs, develops and documents informed assumptions about how the

---

<sup>1</sup> Arthur, J.B. and Huntley, C.L. (2005). Ramping up the Organizational Learning Curve: Assessing the Impact of Deliberate Learning on Organizational Performance under Gain Sharing. *Academy of Management Journal*, 48, 1159-1170. <http://dx.doi.org/10.5465/AMJ.2005.19573115>

knowledge product will be used, and assesses barriers and facilitators to knowledge uptake for the target audience.

Questions to consider about the needs of your target audience:

- What matters to them?
- What question are they trying to answer?
- What problem are they trying to solve?
- Where does this product fit in their workflow?
- What format is appropriate for reaching them?

Questions to consider about how the target audience will use the product:

- Is the product filling a knowledge gap? If so, what?
- When will they use this product (e.g., at a specific phase of implementation, before a particular conference)?
- What is the need for this product in this format?
- Do they need this product now? Why or why not?

Knowledge translation is an important way to support evidence-based practice. Knowledge acquisition relies on a body of credible work, not the opinion of one author. When possible, knowledge professionals should focus on sharing research as part of a body of work by compiling the most credible up-to-date information, such as through a systematic review. While individual studies are appropriate for communicating with other researchers or research funders, practitioners are better able to use information that is interpreted within the context of the existing body of relevant evidence.

Any knowledge product should be clear about what is uncertain or controversial in the evidence because transparency is necessary to establish credibility. A knowledge product that synthesizes weak evidence into strong recommendations misrepresents expertise and may be quickly proven inaccurate, which reduces trust in future products. Table 1 presents some common barriers to knowledge uptake and strategies to overcome them.

**Table 1. Common Barriers to Knowledge Uptake and Strategies to Overcome Them**

Barriers	Strategies
<p><b>Information is of unclear relevance and quality.</b> Practitioners may face difficulty understanding how or why research is relevant to their work. Some practitioners may possess limited ability to evaluate the quality of the research and underlying evidence.</p>	<p>Authors should present information in a way that helps practitioners use the right evidence for the right decisions. They should consider the parameters and scale of the existing body of evidence and identify information relevant to the scale of the decision, such as by synthesizing sector relevance and implications for local environments into context-specific evidence that may otherwise seem contradictory.</p>

	<p>Authors also should be mindful to translate research in a way that helps users understand bias, limitations, and uncertainty to ensure they are more informed consumers of evidence.</p>
<p><b>There is insufficient time to review information.</b> Practitioners are often faced with large volumes of research to sort through, with limited time available to read lengthy products.</p>	<p>For activities that generate large, dense documents, graded entry formats like the example provided in Figure 1 allow practitioners to access information at an appropriate level for their existing knowledge. This means the same or similar information is presented in multiple formats with varying levels of complexity. For example, a common graded entry approach is to emphasize the conclusions or key messages on no more than one page at the beginning of a document, followed by a brief executive summary of roughly three pages and then the lengthier full report.</p>
<p><b>Information is difficult to locate.</b> Practitioners with limited time and competing priorities may have difficulty finding resources, either because they do not know the resources exist or because they do not remember hearing about the resources. Even the most well-executed knowledge management system is useless if it is not used.</p>	<p>Authors should vary distribution approaches and channels by keeping the following in mind:</p> <ul style="list-style-type: none"> <li>● Do not assume people have seen a product just because it is not new.</li> <li>● Repeat distribution over time. New staff join organizations regularly and may not know a product exists. If a product is relevant to the subject of a project or a particular time in a typical project cycle, share it again.</li> <li>● Regularly coach technical assistance providers and supporters about useful resources and where to look for them. Then they will be able to share the resources with implementers as needed.</li> <li>● Ensure knowledge management systems support the entire knowledge cycle (generate - capture - share - apply), and incorporate behavior change approaches into dissemination.</li> </ul>
<p><b>Information is not accessible.</b> Research products tend to have long, dense, complicated technical descriptions, which non-researchers may not understand and which also may be difficult for local practitioners who are not native speakers of the product's language to follow. These contradictions are both a barrier to use and an equity issue. In addition, access to research may be restricted behind paywalls.</p>	<p>Authors and editors should abide by the U.S. Government's <a href="#">plain language guidelines</a>. Knowledge translation efforts help ensure research is accessible and available for practitioners.</p>

Figure 1

### Spotlight on: Graded Entry Format

The Biodiversity Results and Integrated Development Gains Enhanced (BRIDGE) project's [2019 USAID Biodiversity Integration Case Study Competition](#) resulted in a collection of 17 cases that illustrate the potential benefits of integrating biodiversity conservation into other sectors. Together, the cases provide a picture of how USAID Missions and implementing partners conceptualize, design, and execute cross-sectoral integration. The companion [BRIDGE learning synthesis](#) highlights the lessons learned from all of the case study submissions and groups them by key factors for success. This format gives users the opportunity to focus on the key learnings from each case study without needing to read each one separately. In contrast, the [competition webpage](#) on BiodiversityLinks provides access to all 17 cases and allows users to sort them based on activity stages, approaches, and integration tools so they can review individual cases as needed.

## Increasing Knowledge Uptake

There are five important factors for increasing knowledge uptake:

1. **Understanding of the audience.** Authors need to be clear on who the audience for the knowledge product is and what they care about. Authors should seek to understand factors like where audience members already go for information, how they use information, what level of detail or rigor is appropriate for reaching them, and what style of knowledge uptake they use most frequently.
2. **Targeted dissemination.** With a deep understanding of the target audience, authors can more strategically disseminate the product. For example, policymakers and grassroots stakeholders are more likely to use knowledge when they are actively involved in its generation through avenues like steering committees. Similarly, using project implementation to generate credible evidence about program effectiveness can increase practitioners' knowledge uptake and use moving forward.<sup>2</sup>
3. **Intentional formatting and structure.** Authors should pay careful attention to formatting and structure to help increase knowledge uptake. They should make sure generally helpful information is the most accessible, then direct users to additional tools for more in-depth information. Authors also should use visual cues like infographics, key recommendation callout boxes, and other visual guidelines to direct users' attention to important pieces of the knowledge product. These visual elements, combined with introductory content that uses

---

<sup>2</sup> Dubois, N.S., Gomez, A., Carlson, S. and Russell D. (2019). Bridging the Research-Implementation Gap Requires Engagement from Practitioners. *Conservation Science and Practice*, 2, 1.

<https://conbio.onlinelibrary.wiley.com/doi/full/10.1111/csp2.134>

language tailored to appeal to specific audience members and highlights use cases relevant to these audience members' areas of interest, support users in skimming and quickly identifying if the content is relevant to them. Authors also should consider non-written formats like video syntheses or podcasts as options to increase accessibility for users.

4. **Actionable recommendations.** Readers should come away from a knowledge product understanding what to do with the information presented to them. Authors should focus on the recommendations or implications of the research instead of the data and findings, but should take care to make clear where the evidence is uncertain or controversial. Authors also should use examples to underpin key points to help users see concepts in action while sharing tools to help users implement associated behavior change at the same time.
5. **Audience validation.** This step is often skipped, but validating findings and recommendations with the target audience is essential for authors to avoid disseminating generic findings or recommendations.

**Figure 2**

### **Spotlight on: User Personas**

Early in the knowledge translation process, knowledge product development teams need to be clear about the target audience; the audience's role, concerns, and needs; and how the product relates to the audience, including how the team hopes the audience will use the product and what behaviors they hope will change as a result. User personas are one tool to help authors understand their audience.

In 2019-2020, the Measuring Impact II (MI2) activity conducted a needs assessment to understand the barriers to biodiversity staff applying adaptive management best practices to their programming. A key finding from the study was that USAID staff influence the actions of other biodiversity staff through facilitating relationships and developing and enforcing processes. As a result, MI2 developed a stakeholder engagement strategy using a version of user personas called *stakeholder engagement cards*. The cards provided a quick overview of eight categories of stakeholders and detailed their responsibilities, the best ways to share information with them, key messages to share with them, what they can do to support adaptive management, and how to engage them. These simple cards reminded technical teams to engage effectively with other USAID staff to improve adaptive management.

## **Developing Strong Recommendations**

At times, knowledge product authors are not well placed to make the most useful or actionable recommendations for the target audience. Making these recommendations often requires a processing and validating step with target audience members that is not always accounted for in product timelines but that allows authors to consider the target audience's knowledge needs and how the audience may contribute to putting recommendations into action. These potential users can be engaged in a variety of ways, from interviews and focus groups to social events and lectures, and can be selected based on

available resources and needs. Small groups tend to result in less formal, more candid discussions, while larger groups can elicit a greater diversity of opinions. Authors should take time to vet their recommendations with these potential users while products are being developed.

When drafting knowledge products that include recommendations, authors should develop **key messages targeted to the appropriate audiences**, which may include policymakers, practitioners, researchers, and the general public. Target audiences are more likely to accept these key messages when the sources are perceived as expert and non-biased. For this reason, potential users should be included in the development process to ensure relevance and practicality of the key messages. Key messages must be written simply in an affirmative tone, and should prioritize the most important information while including a simple action, or set of actions, that improve self-efficacy.

**Table 2. Example Key Messages**

Note: These example key messages are derived from the biodiversity measures recommendation provided in the [Impact Evaluation Feasibility Assessment of the USAID/Zambia Eastern Kafue Nature Alliance Activity](#). They are aimed at convincing four target audiences to adopt this recommendation and are tailored according to what each audience cares about in the context of the activity. The recommendation, listed on page 63, is: “Overall, we recommend a combination of approaches for monitoring biodiversity outcomes that leverages existing datasets and data streams from partners with new data sources. Remote sensing data, particularly forest cover, provides rich and readily available proxies for biodiversity, as well as important habitat outcomes. Additionally, the most likely direct biodiversity indicators will involve changes in wildlife behavior or spatial distributions near treatment sites. Camera traps will provide an efficient balance between cost and field effort, yielding high-quality data for a broad diversity of large mammals, and the long record of aerial censuses and recent SMART monitoring activities make valuable baselines for understanding biodiversity outcomes for common large-bodied species.”

Target Audience	What do they care about?	Key Message
<b>Policymakers</b>	Understanding how to translate evidence into policy recommendations so they can better serve the public.	To ensure the study is cost-effective, we recommend a combination of approaches for monitoring biodiversity outcomes that will leverage existing datasets and data streams from partners with new data sources. Based on the team’s preliminary assessment, the most likely direct biodiversity indicators will involve changes in wildlife behavior or spatial distributions near treatment sites.
<b>Practitioners</b>	Supporting USAID in achieving development outcomes, including those beyond biodiversity conservation, when possible.	Our recommendation of a combination of approaches for monitoring biodiversity outcomes includes leveraging existing datasets and data streams from partners with new data sources. To help contextualize biodiversity indicators, we find that it’s important to use remote sensing data for forest cover. Taxonomic diversity will provide rich and readily available proxies for biodiversity. Using resources such as camera traps will yield high-quality data that can include key target species (i.e., elephants and lions). Additionally, the record of aerial censuses in GKE [Greater Kafue Ecosystem], and recent SMART [Spatial Monitoring and Reporting Tool] monitoring activities, make valuable baselines for understanding biodiversity outcomes for common large-bodied species (ungulates and elephants).
<b>Researchers</b>	Generating measurable and testable data, gradually adding to the accumulation of human knowledge.	To ensure the study contains a balance between cost and field effort, it is important to utilize existing datasets and data streams from partners with new data sources. Using remote sensing data such as camera traps will yield high-quality data for a broad taxonomic diversity of large mammals, including key target species (i.e., elephants and lions). In addition, the long record of aerial censuses in GKE,

		and recent SMART monitoring activities, make valuable baselines for understanding biodiversity outcomes for common large-bodied species (ungulates and elephants).
<b>General public</b>	Understanding the evidence well enough to make informed judgements about programs.	To ensure the study is not only cost-effective, but also provides a balance of field effort, we recommend using a combination of approaches for monitoring biodiversity outcomes. This involves leveraging existing datasets and data streams from partners with new data sources. Based on the team's preliminary assessment, the most likely direct biodiversity indicators will involve changes in wildlife behavior or spatial distributions near treatment sites. Through the utilization of existing datasets, new data sources such as camera traps and other remote sensing data can be used to monitor the biodiversity of the area.



Strong recommendations are more likely to be adopted when they **focus on a small number of key points** and don't include many different issues or considerations. Additional resources can always be created if needed.

Recommendations are more likely to be implemented if they contain a series of **very simple, well-understood steps combined with a trigger** that speaks to a specific audience and connects to outcomes (refer to Table 3 for examples). When cross-linking items within the recommendations, it can be helpful to include a cheat sheet or visual representation to orient users.

**Table 3. Example Trigger-Step Combinations**

Trigger <i>If _____ happens...</i>	Steps to Take <i>...then do _____.</i>
<p><b>If</b> there is a major election or a change in national government...</p>	<p>...<b>then</b> reassess the findings of your political economy analysis and consider conducting an abbreviated one to document important changes.</p>
<p><b>If</b> context analysis concludes there is weak oversight of ranger groups...</p>	<p>...<b>then</b> consider alternatives to law enforcement approaches, including steps to strengthen oversight, before proceeding with the ranger work.</p>

When providing recommendations, authors must ensure the recommendations are **actionable** and the audience can visualize themselves using the information. This step will make it easier for audience members to remember the recommendations and be more likely to implement them, increasing the chance of utilization of the knowledge product. Below are guidelines for creating actionable recommendations.

## Creating Actionable Recommendations

Before submitting the first draft of a knowledge product, authors should review their recommendations to determine how they may affect the users' perceptions of the authors' credibility. To ensure their credibility is intact, authors should revise any recommendations that are lengthy, time-consuming, resource-intensive, or too vague to be actionable. They also should revise any recommendations that are not aligned with operational models like the program cycle, sensitive to how projects are implemented, or sensitive to users' institutional or political contexts, and that recommend the same things as every other document or may otherwise negatively affect the users' perception of the authors' and product's credibility. In situations where recommendations are resource-intensive, authors should consider breaking those recommendations down into smaller steps and note how they build on each other. Recommendations should be specific enough to the findings that they can be differentiated from other

recommendations. If the recommendation supports general wisdom, the author should explicitly point that out and note any nuances the product highlights.

Once authors draft a clear and strong recommendation, there are a few things they should do to refine its construction to increase its chances of uptake. First, they should consider whether the recommendation is written in such a way that the reader can visualize performing the task. Second, they should consider the trigger within the recommendation that could signal the reader to act by asking if there is a red flag, sign of promising opportunity, stage in the project cycle, or other indication that should cause the reader to implement the recommendation. Third, authors should consider whether the recommendation could be described as having multiple steps, which will make it easier for the reader to visualize. Finally, the author should consider whether the recommendation may cause peers to question the reader's decision to follow the recommendation. Recommendations that are known to touch on sensitive or challenging issues should be couched in a way that presents them as positive and non-threatening. This requires sensitivity to the institutional or political contexts of the users. Table 4 provides an example of how to revise a recommendation so that it prompts the reader to take action by referencing context-specific triggers.

**Table 4. Example Recommendation with Triggers to Prompt Action**

<b>Triggers to Prompt Action</b>	
<b>Basic recommendation</b>	Advocate for more transparency laws.
<b>Better recommendation</b>	Advocate for transparency laws, especially during political transitions or in the wake of major corruption scandals.

Authors can make recommendations more useful by being specific about the target audience or user, the program life cycle, specific tools that could be effective, potential stakeholders to engage, and the resources needed for the recommendation. For example, it may seem reasonable to tell a practitioner that they should guide the farmers they work with to change their crop systems in specific ways to be more resilient to climate change, but without clear information on how to overcome the farmers' barriers to change, this information isn't actionable. It also is important to include the time horizon of recommendations and the level of impact these recommendations will have on the end beneficiaries (in this case, farmers). This is necessary to consider if there are "big ideas," such as reforming international systems, that may be appropriate to propose as solutions but they are far outside the actionable areas of influence for many audiences. To increase the chances of uptake, the author should also consider including low- or local-level recommendations. Table 5 details how to use this guidance to develop actionable recommendations.

**Table 5. Developing Actionable Recommendations**

Specific Guidance	Explanation	Examples
Do not recommend more research.	Few practitioners have resources for research. Although there is always more to know or discover, it is important for practitioners to recognize a limit and know when to move forward with the information available. Authors should keep this in mind. However, it can be appropriate for authors to recommend data collection for things like performance data, context analysis in advance of design, etc. Such recommendations should include a brief explanation of the function of the research (or research-like activity) and be clear about the target audience for the recommendation.	<p><b>Basic recommendation:</b> Conduct additional research on how gender interfaces with corruption in sub-Saharan Africa.</p> <p><b>Better recommendation:</b> Include indicators related to the gendered experiences of men and women in your monitoring and evaluation plan to more fully understand how gender interfaces with corruption, especially for programs in sub-Saharan Africa where such data is limited. With this data, you will be able to more effectively adapt your programming.</p>
Limit the number of recommendations that direct the reader to "consider" something.	At times, authors invite someone to "consider" something out of politeness or deference, but more direct language should not be considered rude. When "consider" is the appropriate recommendation, be sure to include in what context practitioners should consider the issue and for what purpose, and try to identify an action that goes with it.	<p><b>Basic recommendation:</b> Consider which stakeholders will bring the most diverse perspectives to the design of your inclusive project.</p> <p><b>Better recommendation:</b> Identify and include stakeholders with diverse perspectives to ensure inclusivity in your project design.</p>
List the most accessible recommended action first.	Starting small or in an accessible manner will build the user's sense that the author understands their operating environment. Studies also show that extremely accessible, "token" behaviors can increase the likelihood of users accepting the new information.	<p><b>Set of basic recommendations:</b></p> <ol style="list-style-type: none"> <li>1) Advocate for legislative reform.</li> <li>2) Require an anti-corruption assessment for each project.</li> <li>3) Work with the media to investigate corruption.</li> </ol> <p><b>Set of better recommendations:</b></p>

		<ol style="list-style-type: none"> <li>1) Identify local actors working on anti-corruption in your context.</li> <li>2) Learn about the relevant laws in your country.</li> <li>3) Work with your colleagues to map how the laws, or the gaps in the laws, impact your work.</li> </ol>
Start the recommendation with a verb, to the greatest extent possible.	Using active voice – which places verbs first – improves specificity and "skim-ability" (i.e., users can more quickly jump to the recommendations relevant to or feasible for them).	<p><b>Basic recommendation:</b> Comprehensive protocols involving checks and balances are needed to reduce the risk of corruption.</p> <p><b>Better recommendation:</b> Institute comprehensive protocols involving checks and balances to reduce the risk of corruption.</p>

## Sharing Knowledge Resources

Authors should develop visual callouts and shareable resources in a range of formats to direct users to what is important. As referenced in Figure 1, **graded entry formats** support sharing resources in multiple ways and can keep the information from feeling overwhelming while still providing options for those who desire more context or information.

Strong knowledge management platforms must be organized and support the graded entry approach. When sharing resources, authors should **consistently direct users to the same platform**. In the case of USAID biodiversity practitioners, [BiodiversityLinks](#) should be the primary platform for knowledge resources. This encourages practitioners to access these platforms when looking for relevant materials, contributing to behavior change over time. These knowledge platforms should include the target product and also allow users to access associated materials. Platform managers should not assume that a user has existing knowledge of the products or information provided in the resources; providing pathways to access all resources should be encouraged as much as possible.

Platform managers should be open to having multiple products on the same topic. Accessing a product once does not mean users will remember that it exists. It is important to refresh peoples' memories about information, and platform managers can **support recall by repackaging content in multiple ways and sharing it frequently**. Similarly, platforms should offer opportunities for learning, rather than just reading. Appealing to a range of adult learning styles will help engage users in the resources, and tools like interactive modules and multimedia products can support these various styles and ensure maximum efficacy for knowledge products.

**Figure 3**

**Spotlight on: How-to Guides on BiodiversityLinks**

BiodiversityLinks contains a collection of [how-to guides for biodiversity practitioners](#). Each how-to guide has an [online interactive version](#), as well as [downloadable PDF versions](#) in both English and Spanish. The site contains multiple paths to the collection of how-to guides, which help users find the supporting documents they are looking for. The how-to guides also are included in the key resources section of the website, and are frequently shared together with relevant examples in newsletters.

One example, [Biodiversity How-To Guide 3: Defining Outcomes & Indicators for Monitoring, Evaluation and Learning in USAID Biodiversity Programming](#) is the third in a series that provide in-depth guidance on key tools and practices to support design teams as they design and manage biodiversity activities within the program cycle and in accordance with the USAID Biodiversity Policy. This document uses the results chains in the second guide and helps users identify key results for developing outcome statements and indicators. The guide exists on BiodiversityLinks in multiple formats, and the site contains pathways between the formats. Below are two of the three versions offered for this guide.

**Image 1. How-to Guide 3: Online Interactive Version**

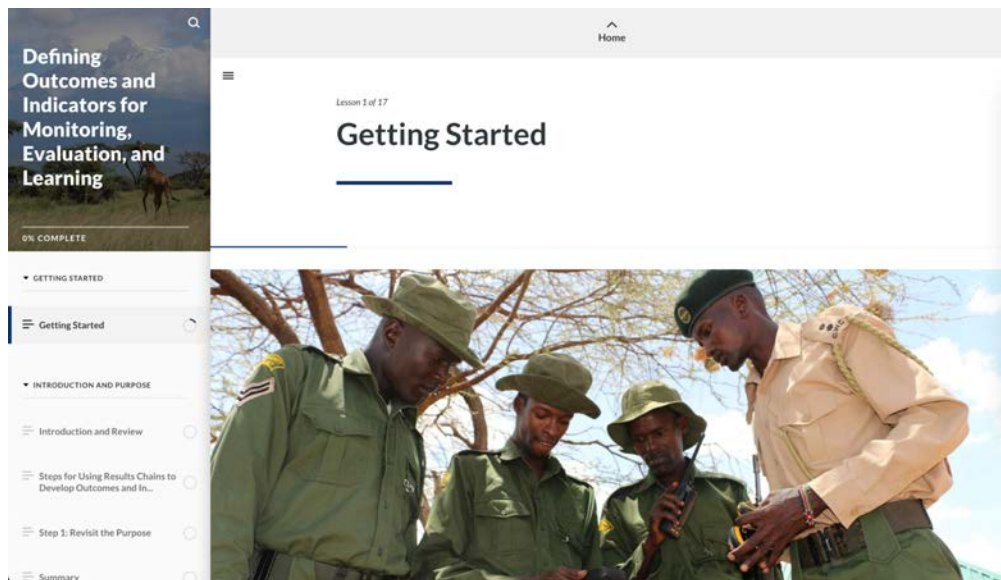


Image 2. How-to Guide 3: English and Spanish PDFs

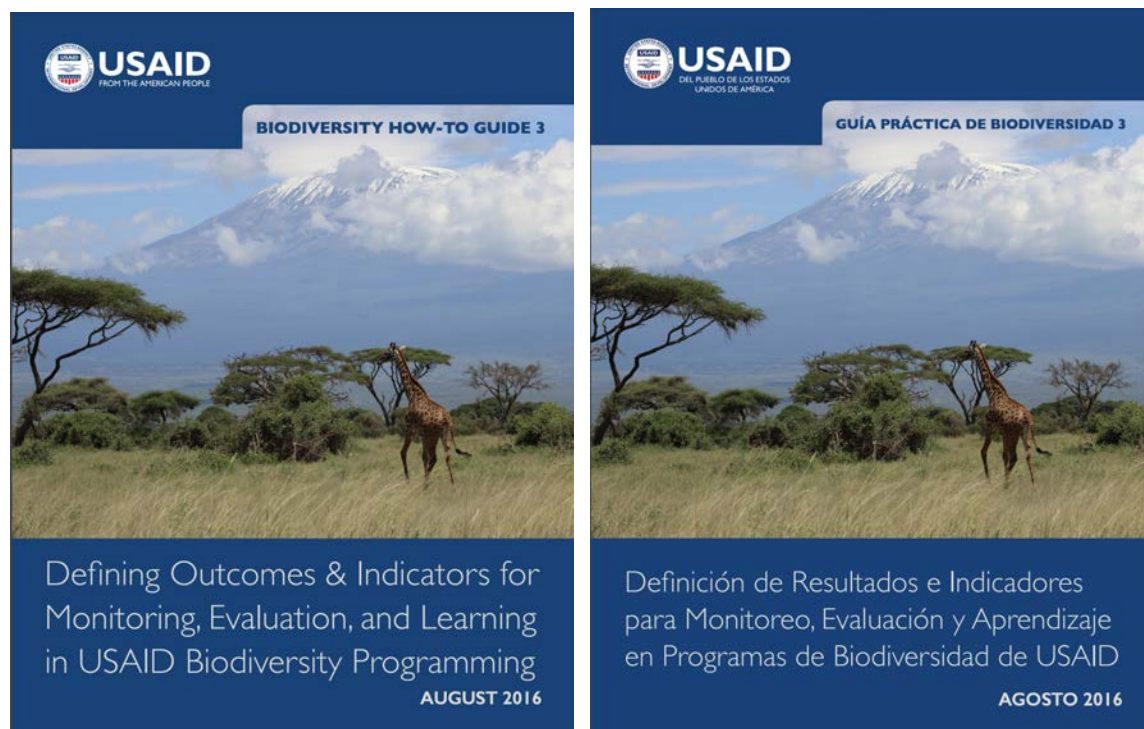


Figure 4

#### Spotlight on: Communities of Practice

[Communities of practice](#) can serve as important complements to knowledge translation. Viewing knowledge translation as one-way can cause people to miss opportunities to learn from others with different experiences or more knowledge. Setting aside time and resources for intentional exchanges with trusted individuals can help consumers of knowledge move from conceptual to practical understanding. USAID has a number of active [biodiversity communities of practice](#), each with its own norms on meetings, communications, and knowledge capture. Knowledge translation practitioners should consider the existing communities of practice related to their subject matter and engage with the communities to enhance knowledge uptake.

## Conclusion

Intentional planning, audience analysis, careful formatting, strong recommendations, and user-focused platforms can make the difference between knowledge products that sit on a shelf or in an inbox and knowledge products that are read, applied, and positively impact future work.