

Section 6: Toolkit Guidance

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What is a Toolkit?

To translate research findings into policy and practice, the Agency for Healthcare Research and Quality (AHRQ) and its grantees or contractors occasionally decide to create toolkits based on their work. An AHRQ workgroup developed the following definitions:

- A “toolkit” is an action-oriented compilation of related information, resources, or tools that together can guide users to develop a plan or organize efforts to conform to evidence-based recommendations or meet evidence-based specific practice standards.
- A “tool” is an instrument (e.g., survey, guidelines, or checklist) that helps users accomplish a specific task that contributes to meeting a specific evidence-based recommendation or practice standard.

Toolkits provide action-oriented guidance for practitioners or policymakers to apply the research to their work. This document outlines considerations for developing effective toolkits, and includes a series of checklists described below.

Checklists

The checklists provided should help the toolkit developer(s) and AHRQ reviewers in designing and checking the final product under a grant or contract with AHRQ. Three checklists will help you with the overall toolkit:

- The first checklist is used to determine if a toolkit is the right method to disseminate your research. Throughout your project, revisit this checklist to see if the results of the research continue to fit the toolkit frame.
- The second checklist will help you develop the toolkit’s contents once you decide on the toolkit format. This list looks at the type of information you should present in a toolkit and how to highlight critical versus supplementary information.
- The third checklist will assist your team in thinking about the framework for your research-based tools—target users, toolkit style, and the function of each tool. The checklist also prompts your team to consider validating the toolkit with its intended audience, steering users to additional information, and measuring the impact of the toolkit.

The fourth checklist is useful for the entire toolkit but is intended for individual tools. This checklist addresses:

- Organization
- Design

- Language

This checklist provides more detail and will aid your team in creating a set of tools that is consistent, making them easier to navigate and use.

In the planning stages and during the production process, review each of the four checklists with your team to ensure that you provide users with a product that includes all critical information. Fill out the four checklists for the entire toolkit, and for each individual tool contained in the checklist, complete checklist four (see Table 1). To proceed, make sure you have answered “yes” to each item in the checklists. If you answer “somewhat” or “no” to any of the items, brainstorm with your team about how to resolve any concerns.

Table 1—Checklists To Use With Your Toolkit and Tools

	Toolkit	Tool
1. “Is This a Toolkit?” Checklist	✓	
2. Toolkit Content Checklist	✓	
3. Toolkit Usability Checklist	✓	
4. Tool Checklist	✓	✓

How Do The Checklists Help Me?

“Is This a Toolkit?” Checklist

Toolkits are effective for presenting action-oriented recommendations, but they are not appropriate for all research. At the beginning of your project, and throughout the process, answer the checklist questions to determine if a toolkit is the proper way to circulate your research findings.

Toolkit Content Checklist

Toolkits should have a standard format and look as well as similar types of information to easily guide users through a process of change. Answer the content checklist questions for your toolkit and tools to determine whether you have provided users with sufficient information to implement the changes in behavior that your research recommends.

Toolkit Usability Checklist

Think deliberately about the toolkit and its components: the potential users, the users’ goals, the toolkit’s look, expert validation, and measures of success. This checklist will help you and your team to plan a well-designed, usable toolkit.

Tool Checklist

This checklist addresses three areas: organization, design, and language.

Cohesive and logical organization helps users navigate the tool, improves comprehension, and encourages use. Answer the questions in the Organization Considerations section to determine how successfully your toolkit aids users in finding and using the information presented.

Each tool should conform to *AHRQ Publishing and Communications Guidelines*. The guidelines ensure a consistent look and feel across materials. You may want to consider consulting with a graphic designer who can assist with layout and incorporating graphic elements into the toolkit. Examine the questions in the Design Considerations section to determine if you can improve the tool’s look and usability.

Clear and concise language aids in communicating your message. Use the Language Considerations section to ensure your grammar and word choice are appropriate for the tool. You may also consider having an editor review the product to ensure these considerations are addressed.

1. “Is This a Toolkit?” Checklist	
<p>A “toolkit” is an action-oriented compilation of related information, resources, or tools that together can guide users to develop a plan or organize efforts to conform to evidence-based recommendations or meet evidence-based specific practice standards.</p> <p>Toolkits are effective for presenting action-oriented recommendations, but they are not appropriate for all research. At the beginning of your project, and throughout the process, address these checklist questions to determine if a toolkit is the proper way to share your research findings.</p> <p>To proceed with a toolkit format, make sure you have answered “yes” to each item in the checklist. If you answer “no” to any of the items, brainstorm with your team about how to resolve any concerns. You may also want to consider pursuing another stand-alone product, such as a research paper or a fact sheet.</p>	
1. What behavior or action are you trying to promote?	
<hr/> <hr/> <hr/>	
2. Why is a package of tools the best way to attain your goal (as opposed to a research paper, fact sheet, or other stand-alone product)?	
<hr/> <hr/> <hr/>	
3. Have you verified that a product like this does not already exist?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Did your research generate multiple action-oriented tools (such as specific procedures, protocols, or other structured activities) that, working together, can help users develop a plan or organize efforts to conform to evidence-based practice?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Have you spoken to potential users to determine the demand for a product like this one? How do you know there’s a demand? What research or data supports this demand?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<hr/> <hr/> <hr/>	

2. Toolkit Content Checklist

Toolkits should have a standard format and look as well as similar types of information to easily guide users through a process of change. Answer the content checklist questions for your toolkit and tools to determine if you have provided users with sufficient information to implement the changes in behavior that your research recommends.

To proceed, make sure you have answered “yes” to each item in the checklist. If you answer “no” to any of the items, brainstorm with your team about how to resolve any concerns.

- | | | |
|--|------------------------------|-----------------------------|
| 1. Are the toolkit and tools based on tasks? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| ▪ Does the toolkit provide sequential steps users should follow? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| ▪ Does the toolkit provide examples of how others have used the toolkit or tools successfully? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Does the first page of the toolkit state its purpose? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Does the first page of the toolkit explain how to use the toolkit? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Does the first page of the toolkit list each tool and its purpose? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Does the first page of the toolkit describe target users and address their differing goals in using the toolkit (see Toolkit Overview Checklist)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. Do the tools provide necessary information regarding what users need to complete tasks, such as: <ul style="list-style-type: none">– Staff time.– Staff skills.– Materials.– Equipment.– Administrative clearances and approvals. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7. Does the toolkit organize resources to achieve a goal through specific actions (assign responsibilities, create a schedule, document progress, and ensure accountability)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 8. Does each tool give adequate instruction on how to use it (e.g., collect and analyze data, interpret results, implement suggestions, and assess impact)? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 9. Does the toolkit provide users with additional resources for more information? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

3. Toolkit Usability Checklist

Think deliberately about the toolkit and its components: the potential users, the users' goals, the toolkit's look, expert validation, and measures of success. This checklist will help you and your team to plan a well-designed, usable toolkit.

To proceed, make sure you have answered “yes” to each item in the checklist. If you answer “no” to any of the items, brainstorm with your team about how to resolve any concerns or consider pursuing an alternative method for disseminating your research results.¹

¹ For question 2, if there is only one target group, the answer will be “no” and the subsequent two questions are not applicable.

3. Toolkit Usability Checklist (continued)															
Users															
1. Have you identified your target group of users and taken them into account when designing the toolkit? How? _____ _____ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No														
2. Is there more than one target group of users? <ul style="list-style-type: none"> ▪ Will they have different goals? ▪ What are some of those goals? _____ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No														
3. Have you explained how different users can adapt the toolkit to suit their needs?	<input type="checkbox"/> Yes <input type="checkbox"/> No														
4. What tasks do you want users to accomplish with each tool? <table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Tool</th> <th style="text-align: left;">Goal</th> </tr> </thead> <tbody> <tr><td>A.</td><td></td></tr> <tr><td>B.</td><td></td></tr> <tr><td>C.</td><td></td></tr> <tr><td>D.</td><td></td></tr> <tr><td>E.</td><td></td></tr> <tr><td>F.</td><td></td></tr> </tbody> </table>	Tool	Goal	A.		B.		C.		D.		E.		F.		
Tool	Goal														
A.															
B.															
C.															
D.															
E.															
F.															
5. Are target users familiar with the toolkit's concepts and terminology?	<input type="checkbox"/> Yes <input type="checkbox"/> No														
Style															
1. How is this toolkit presented? <input type="checkbox"/> Web site <input type="checkbox"/> Printed Document <input type="checkbox"/> Video (CD/DVD) <input type="checkbox"/> Audio (Digital, Web-based) <input type="checkbox"/> Other: _____															
<ul style="list-style-type: none"> ▪ AHRQ has style guides for many different kinds of presentations that include information elements, such as font size, typeface, and color. Does the toolkit comply with <i>AHRQ Publishing and Communications Guidelines</i> for that presentation style? 	<input type="checkbox"/> Yes <input type="checkbox"/> No														
2. Layering, or page sequence, in a Web-based environment reflects the hierarchy of organization in a document. Primary information is on the first level, and secondary information is on the second level of the Web site. <ul style="list-style-type: none"> ▪ If your toolkit is Web-based, does your critical information appear on the primary level? ▪ Is your secondary information linked so it is supplementary to the first level of information? 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable														
3. Does the toolkit as a whole have a cohesive, AHRQ-branded look and follow the design specifications laid out in the <i>AHRQ Publishing and Communications Guidelines</i> ?	<input type="checkbox"/> Yes <input type="checkbox"/> No														

3. Toolkit Usability Checklist (continued)	
Testing and Evaluation	
1. Will the toolkit be tested before it is published?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> ▪ How will the toolkit be tested? <ul style="list-style-type: none"> <input type="checkbox"/> Expert review <input type="checkbox"/> Usability testing <input type="checkbox"/> Focus groups with users <input type="checkbox"/> Other: 	
2. How can users measure the impact of the toolkit within their organization? What are the measures of success? (Suggest 3-5 methods of impact measurement.)	

Implementation	
1. If the toolkit requires updates, will you, the developers, perform those updates?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable
2. If the toolkit is a Web site and has the capacity to serve as a "live" resource for users (e.g., communities of practice for those with shared interests, bulletin boards, networking sites), which organization will provide ongoing quality oversight and technical support?	

4. Tool Checklist	
This checklist addresses three areas: organization, design, and language. To proceed, make sure you have answered "yes" to each item in the checklist. If you answer "somewhat" or "no" to any of the items, brainstorm with your team about how to resolve any concerns.	
Organization Considerations	
Cohesive and logical organization helps users navigate the tool, improves comprehension, and encourages use. Answer the questions in this section to determine how successfully your toolkit aids users in finding and using the information presented.	
1. Does the tool have an advance organizer, such as a table of contents or site map?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> ▪ Does the advance organizer provide a coherent, complete "big picture" view of the tool? 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
2. Does the tool have an organizational hierarchy and a clear structure of main topics and sub-topics?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
<ul style="list-style-type: none"> ▪ Restricting your hierarchy to fewer than five levels makes it easier for users to navigate the tool. Does the tool have fewer than five levels in the hierarchy? ▪ Is the hierarchy maintained throughout the tool? 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
3. Is the tool structure based on tasks?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat

4. Tool Checklist (continued)		
4.	Does the tool have headings (this can apply to printed documents, Web-based documents, presentations, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪	Are sections or headings arranged in a logical order? Do they clearly describe the contents of the sections they cover?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
▪	Do the paragraphs relate to the headings? (Do they contain information users would expect to find under each heading?)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
▪	Does each section identify the appropriate user?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
5.	Are there clear cross references to other sections, research, tools, or toolkits (e.g. Web hyperlinks)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
Design Considerations		
Each tool should conform to <i>AHRQ Publishing and Communications Guidelines</i> . These ensure a consistent look and feel across materials. You may want to consider consulting with a graphic designer who can assist with layout and incorporating graphic elements. Examine the questions in this section to determine if you can improve the tool's look and usability.		
1.	Does each tool's design adhere to <i>AHRQ Publishing and Communications Guidelines</i> and have the same branding and style?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	Does each tool address 508 compliance issues? ²	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	Does the tool appear accessible and easy to use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	Does the tool have a visual focal point (logo, title, or design element)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.	Does the tool have an intentional and predictable grid with elements lining up vertically on the page? For example, do paragraphs start at 1" and all bulleted lists start at 2" from the border?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6.	Does the tool use common and easily readable fonts, such as Arial, Verdana, Tahoma, Garamond, or Times Roman?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7.	Are different fonts or sizes used to denote different levels of the organizational hierarchy?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8.	Does the tool use emphasis typeface techniques, such as bold and italics, without overusing them?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9.	Are the fill-in spaces on the tool large enough for users to comfortably enter information? If the toolkit is Web based, do the fields expand to accommodate any number of characters?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10.	Are pages, items, or questions numbered to help users navigate?	<input type="checkbox"/> Yes <input type="checkbox"/> No
11.	Does the tool use bullets or numbers to list important information?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12.	Does the tool use white space—the area not used for text, such as borders and the space between lines—to visually organize sections and items and make the tool more reader friendly?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
13.	Does the tool use color and shading to help users navigate?	<input type="checkbox"/> Yes <input type="checkbox"/> No
14.	Does the tool use visual displays in addition to text, such as tables, lists, and graphics?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
▪	Do the visuals have descriptive titles?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▪	Do the visuals support the text and help communicate the message to users?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
▪	Are these visuals 508 compliant, i.e., do they contain text to make them accessible to individuals with disabilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat

² Section 508 Amendment to the Rehabilitation Act of 1973 requires Federal agencies to make their electronic and information technology accessible to people with disabilities. See www.section508.gov and Section 2 of the *AHRQ Publishing and Communications Guidelines* for more information and additional resources.

4. Tool Checklist (continued)		
Language Considerations		
Clear and concise language aids in communicating your message. Use this section to ensure your grammar and word choice are appropriate for the tool. You may also consider having an editor review the product to ensure these considerations are addressed.		
1. Does the tool use clear and concise language that's free of jargon?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2. Does the tool use positive or simple negative sentence construction whenever possible? (for example: <i>Always include</i> or <i>never include</i> not <i>don't include</i>)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3. Does the tool use the active voice (for example: <i>consult with stakeholders</i> not <i>stakeholders should be consulted</i>)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4. Does the tool use personal pronouns (for example: <i>your</i> evaluation team)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5. Does the tool use action verbs (for example: <i>assess</i> not <i>make an assessment</i>)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6. Does the tool use gender-neutral words?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
7. Does the tool use words and terms consistently?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
8. Does the tool use lists or tables for several items or conditional statements (i.e., <i>if X, then Y</i>)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
9. Does the tool use correct spelling, grammar, and punctuation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

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