Toolkit Development Checklist

Toolkit Content & Format

☐ Explicitly state the purpose of the toolkit

☐ Include summary of toolkit purpose and contents

☐ Include table of contents/landing page to navigate document/web content

☐ Identify intended user(s) for each tool

☐ State setting(s)/context(s) for intended toolkit use

☐ Provide information on data (or lack of) supporting practices on which toolkit is based
  e.g., research evidence base

☐ Provide details on toolkit development process
  e.g., expert review, pilot testing, or user input

☐ Provide information on experience (or lack of) with and/or testing of individual tools

☐ Include actionable steps to acheive toolkit goals

☐ Provide process/outcome measure suggestions for each tool
  e.g., to assess whether individual tools are being implemented as intended and for achieving the intended goals

☐ Ascertain whether to include supporting materials if appropriate
  e.g., for patients, providers and staff, and to facilitate implementation

☐ Potential conflicts of interest

Additional Suggestions

- Include tools and/or accompanying resources in a format that allows customizing to the organization
  (e.g., editable formats that allow addition of a logo)
- Use a format that allows the toolkit to be easily updated after initial deployment
  (e.g., individual modules that can be updated on a website)
- Include real-world examples or stories
- State the potential added value of the toolkit, over and above other toolkits that are already publicly available
- State the source(s) of funding that supported the toolkit
- Suggest resources needed to facilitate successful implementation of the toolkit or individual tools
- Help users to recognize the value of identifying a toolkit champion, leader, or an implementation team within the organization to facilitate the implementation
- Indicate the sequence in which the activities in a tool or toolkit should be undertaken (could include step-by-step instructions)
- Suggest core (as opposed to optional) elements of the toolkit in achieving the toolkit's goals
- Provide detail on the process used to evaluate the toolkit and the results of this evaluation (if applicable)
- Provide a mechanism for users to give feedback to developers after deployment

Toolkit Development Methods

☐ Subject toolkit and/or included tools to usability testing
  e.g., obtain feedback from potential end users on usability, observe how users use the toolkit and understand the tools

Toolkit Development Checklist

Toolkit Development Methods, continued

Additional Suggestions

- Explore the needs of potential users, or have in hand evidence of such need (e.g., assessment of what kind of tools would be most helpful) during the early development phase of the toolkit
- Search for existing tools to guide the content of the toolkit
- Include patients, caregivers, and/or patient representatives who would potentially be affected by toolkit implementation in the development process
- Include representatives from professional disciplines that would use the toolkit in the development process
- Incorporate behavioral theory (individual or organizational) into toolkit development process
- Involve experts in reviewing toolkit content
- Pilot test the toolkit's use in practice
- Ensure patient materials/resources are easy to read, understandable, and culturally appropriate
- Study attempts to adopt the toolkit

Toolkit Evaluation Methods

Suggestions

- Feasibility of tools or the adoption of the toolkit (e.g., tracking the time that using a tool takes)
- Barriers to adopting the toolkit
- Facilitators for adopting the toolkit
- The effects of the toolkit on patients (e.g., evaluate falls after the introduction of a fall prevention toolkit)
- Potential unintended consequences associated with use of the toolkit (e.g., unexpected benefits, problems, failures, or costs)
- The effects of the toolkit on resource use or costs