## Toolkit Checklists

A toolkit is a collection of related information, resources, or tools that together can guide users to develop a plan or organize efforts to follow evidence-based recommendations or meet evidence-based practice standards. A tool is an instrument (e.g., survey, guideline, or checklist) that helps users accomplish a specific task that contributes to meeting a specific evidence-based recommendation or practice standard. This series of checklists is for developing toolkits. Instructions for formatting toolkits are in [Appendix 1-E](https://www.ahrq.gov/research/publications/pubcomguide/pcguide1ape.html).

The following checklists help toolkit developers design and check the final product (see Table 1):

* The first checklist (Is This a Toolkit?) determines if a toolkit is the right method to disseminate the research.
* The second checklist (Tool Content Checklist) looks at the type of information you should present in a toolkit and how to highlight critical versus supplementary information.
* The third checklist (Tool Checklist) addresses organization, design, and language to create a consistent set of tools.

Table 1—Checklists To Use With Your Toolkit and Tools

|  |  |  |
| --- | --- | --- |
|  | **Toolkit** | **Tool** |
| 1. **“Is This a Toolkit?” Checklist**
 | ✓ |  |
| 1. **Toolkit Content Checklist**
 | ✓ |  |
| 1. **Tool Checklist**
 | ✓ | ✓ |

### “Is This a Toolkit?” Checklist

Make sure you answer “yes” to each item in the checklist to ensure your content constitutes a toolkit. If you answer “no” to any items, resolve any concerns or consider a product other than a toolkit.

1. What behavior or action are you trying to promote?
2. Why is a package of tools the best way to attain your goal, as opposed to another type of product?
3. Have you verified that a product like this does not already exist?

❑ Yes ❑ No

1. Did the research generate multiple action-oriented tools (such as specific procedures, protocols, or other structured activities) that help users develop a plan or organize efforts?

❑ Yes ❑ No

1. Have you spoken to potential users to determine the demand for a product like this?

❑ Yes ❑ No

What research or data indicate demand for a toolkit?

### Toolkit Content Checklist

Answer these questions for your toolkit and tools to determine if you have provided users with sufficient information to implement the changes your research recommends. Make sure you answer “yes” to each item in the checklist. If you answer “no” to any of the items, determine how to resolve any concerns.

1. Does the toolkit state its purpose?

❑ Yes ❑ No

1. Does the toolkit explain how to use the toolkit?

❑ Yes ❑ No

1. Is the toolkit task based?

❑ Yes ❑ No

1. Does the toolkit provide a series of steps to follow?

❑ Yes ❑ No

1. Does the toolkit list each tool and its purpose?

❑ Yes ❑ No

1. Does the toolkit describe target users and address their differing goals in using the toolkit?

❑ Yes ❑ No

1. Do the tools provide information on resources needed to complete tasks, such as staff time, staff skills, materials, equipment, and administrative approvals?

❑ Yes ❑ No

1. Does the toolkit organize resources to achieve a goal?

❑ Yes ❑ No

1. Does each tool have instructions?

❑ Yes ❑ No

1. Does the toolkit provide users with additional resources for more information?

❑ Yes ❑ No

1. Will the toolkit be tested before it is released?

❑ Yes ❑ No

* How will the toolkit be tested?

 ❑ Expert review ❑ Focus groups with users

 ❑ Usability testing ❑ Other:

1. Does the toolkit contain evaluation tools to measure impact?

❑ Yes ❑ No

* What are the measures of success? (Suggest 3-5 methods of impact measurement.)

### Tool Checklist

This checklist addresses three areas: organization, design, and language. Make sure you answer “yes” to each item in the checklist. If you answer “no” to any items, resolve any concerns.

**Organization Considerations**

1. Does the tool have a table of contents or site map?

❑ Yes ❑ No

* Does the table of contents or site map provide a complete view of the tool?

❑ Yes ❑ No

1. Does the tool identify the appropriate user?

❑ Yes ❑ No

1. Does the tool have sections, headings, or tasks arranged in a logical order?

❑ Yes ❑ No

* Do they clearly describe the contents of the sections they cover?

❑ Yes ❑ No

1. Are there links to other sections, research, tools, or toolkits (e.g., web hyperlinks)?

❑ Yes ❑ No

**Design Considerations**

1. Is each tool 508 compliant?

❑ Yes ❑ No

1. Does the tool use common and easily readable fonts, such as Arial, Verdana, Tahoma, Garamond, or Times Roman (AHRQ’s preferred fonts)?

❑ Yes ❑ No

1. Are different fonts or sizes used to denote different levels of the organizational hierarchy?

❑ Yes ❑ No

1. Does the tool use bold and italics without overusing them?

❑ Yes ❑ No

1. Do fields for entering information expand to accommodate any number of characters?

❑ Yes ❑ No

1. Are pages, items, or questions numbered?

❑ Yes ❑ No

1. Does the tool use bullets or numbers to list important information?

❑ Yes ❑ No

1. Does the tool use borders and the space between lines to visually organize sections and items and make the tool more reader friendly?

❑ Yes ❑ No

1. Does the tool use tables, lists, and graphics?

❑ Yes ❑ No

* Do the visuals have descriptive titles?

❑ Yes ❑ No

* Do the visuals support the text and help communicate the message to users?

❑ Yes ❑ No

* Are the visuals 508 compliant, i.e., do they contain text to make them accessible to individuals with disabilities?

❑ Yes ❑ No

**Language Considerations**

1. Does the tool use clear and concise language that’s free of jargon?

❑ Yes ❑ No

1. Does the tool minimize use of acronyms and abbreviations and spell them out on first use?

❑ Yes ❑ No

1. Does the tool use active voice?

❑ Yes ❑ No

1. Does the tool use personal pronouns?

❑ Yes ❑ No

1. Does the tool use action verbs?

❑ Yes ❑ No

1. Does the tool use gender-neutral words?

❑ Yes ❑ No

1. Does the tool use words and terms consistently?

❑ Yes ❑ No