

Technical Transfer Planning Worksheet

Sagebrush Technical Transfer Network | 2025

What is the Technical Transfer Planning Worksheet?

Most of the work of technical transfer is planning an effort that engages and supports a specific audience with a management need. This worksheet expands on Steps 1-3 of the [Technical Transfer Framework](#) to aid in planning your technical transfer effort.

Respond to the questions below with your technical transfer team. These questions are highly interrelated and do not need to be answered in order. Consider how to engage the audience in the planning process rather than assuming that you fully understand their needs. Refer to the [Framework](#) for additional information on each step.

① DEFINE YOUR AUDIENCE AND MANAGEMENT NEED

To center your effort, identify the “for who?” and the “why?”

Understanding and clearly articulating the audience and their needs is key to planning a technical transfer effort. These two elements—the audience and the management need—rather than a specific technical product, are central to the remaining steps of the Framework.

Key questions for Step 1:

1A. *What is the management need, and why is it important? What resource management decision, action, or question is being addressed?* Articulating the purpose of technical transfer helps prioritize limited technical transfer resources for topics with the most impact.

1B. *Who is your intended audience(s) or end-user(s)? What role(s) do they play in addressing the management need?*



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1C. *Where do you want your audience to land on the **Proficiency Pyramid** (Framework Figure 2) after technical transfer?* Be realistic about what your effort can achieve. Recognize that the further up the pyramid you go, the more time and effort it takes for effective technical transfer and the narrower your audience.

1D. *What is your audience's background and technical skill level relative to the topic?* Is there a need to develop a shared understanding of the technical issues? Meet your audience where they are, start from the beginning, and provide a basic foundation on the topic, especially if the group varies in background or skill level.

1E. *How can your audience use information to inform a decision, action, or question?* Understanding the audience's decision process and how they can use information to inform their decision(s) will help set realistic expectations of technical transfer. Remember that decisions are based on many factors beyond technical information.

② DETERMINE IF TECHNICAL TRANSFER IS APPROPRIATE

Verify you are using the appropriate tool for your audience's needs

Technical transfer is not always appropriate or timely. Step 2 of the **Technical Transfer Framework** helps determine if technical transfer is an appropriate tool. Refer to *Table 1* in the **Framework** if any of the statements below do not apply to your audience and management topic. **You do not need to check all the boxes**, but if any of these “enabling conditions” are absent, you may need to consider additional approaches.



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Key considerations for Step 2:

- ☐ Data, science, or other information can influence the management need (i.e., it is not dictated by policy, law, regulation, etc.).
- ☐ A sufficient volume of actionable information (science, data, traditional or local knowledge, etc.) exists to inform management need.
- ☐ You have relationships, trust, and credibility with an audience that can influence decisions or actions related to the management need.
- ☐ The social and administrative conditions exist to set your effort up for success. Your audience is ready to act.
- ☐ Your team has the capacity (time and skills) to address at least some technical transfer barriers for this management need.

③ DEVELOP A TECHNICAL TRANSFER APPROACH

Tailor your approach to your audience's needs and desired outcomes

Selecting an approach for your technical transfer effort is about increasing your audience's proficiency while remaining engaging and participatory. Each effort should center its audience's management need, social, cultural, and institutional context, decision process, and level of knowledge or skills.

Key questions for Step 3:

3A. *What does success look like for this effort?* Success may be a tangible result such as a shared prioritization map or an increase in knowledge. Success may also include more intangible outcomes like relationship-building or increasing your audience's proficiency (*Framework Figure 2*) and confidence in using technical information.

3B. *What are the learning outcomes or the main take-home messages for your audience? What do you want them to walk away with?* Write them down below, as directly and succinctly as possible:

Learning Outcome 1:

Learning Outcome 2:

Learning Outcome 3:

3C. *How does your approach filter, distill, and integrate information from the existing body of knowledge?* The most impactful technical transfer filters and distills the most actionable information relevant to a management need, not just individual products or studies. Frame technical information in the context of your audience's values and issues of concern and incorporate local information, knowledge, and experience when available.

3D. *What format(s) will likely fit your management need, audience, and desired proficiency level(s)?* If your formats are limited (e.g., virtual only), be realistic about the expected outcomes. Refer back to the Proficiency Pyramid (*Framework Figure 2*) and suggested approaches (*Framework Figure 3*) when considering formats.

3E. *Who are the most effective messengers for your audience? Who has trust and credibility with the audience and sufficient knowledge to carry out the technical transfer?* Consider individuals and organizations who have established positive relationships with your audience, credibility on the topic, and the ability to be engaging speakers or trainers. Leverage the skills and relationships of your team.

3F. *Are there other relevant research or technical transfer efforts that focus on this management need, and if so, how can your work synergize with these efforts?* Teaming up with other groups or science producers can help your audience integrate information and avoid a narrow, product-centric technical transfer effort.



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