

RDS toolkit request process checklist

This document is a checklist for RDS project leads to use to help track progress. This checklist should be saved in the project folder, and it should be regularly updated. A copy of this checklist can be shared with the requester along with the [toolkit request process overview](#) document.

Note – the project lead responsibility is to ensure that these steps are carried out, not necessarily personally carrying out all steps, and may draw upon wider support from the RDS team.

Key stage	Project lead to ensure completion of these steps	Main steps for toolkit requester
1. Project initiation	Initial discussion about RDS as a suitable tool, scope and functionality, and outcomes. <input type="checkbox"/>	Ensure local governance for using RDS for their toolkit is in place. <input type="checkbox"/>
	Define resource requirement (RDS/local balance), project team structure - e.g. lead practitioner, stakeholder reference group, and knowledge manager(s). <input type="checkbox"/>	Complete part 1 toolkit request form . <input type="checkbox"/>
	Agree timeline and draft Gantt chart. <input type="checkbox"/>	
	Ensure the requester is clear on requirements around ongoing support and quality criteria, specifically local governance approval is in place. <input type="checkbox"/>	
2. Design	Scope toolkit structure. <input type="checkbox"/>	Provide prompt replies to design questions. <input type="checkbox"/>
	Determine which specific tools will be used. <input type="checkbox"/>	
3. Development	Short sprints of development with review by lead practitioner/reference group. <input type="checkbox"/>	Clinical / practitioner review and sign-off of content before testing. <input type="checkbox"/>
	Create risk register for project. <input type="checkbox"/>	
	Ensure publication and review dates. <input type="checkbox"/>	
	Conduct accessibility and copyright compliance checks. <input type="checkbox"/>	
4. User testing and content management plan	Make post-testing amendments. <input type="checkbox"/>	Coordinate acceptance and usability testing. <input type="checkbox"/>
	Define the user testing approach in collaboration with requester. <input type="checkbox"/>	
	Define content management and updating processes. <input type="checkbox"/>	Complete part 2 toolkit request form (project lead or RDS team can support with this). <input type="checkbox"/>
	Organise local editor training. <input type="checkbox"/>	
Note – user testing consists of acceptance and usability testing. Acceptance testing aims to ensure that the product meets stakeholders' requirements, while usability testing aims to ensure the toolkit is easy and intuitive to use.		
5. Sign-off and go-live	Final clinical/lead review and sign-off. <input type="checkbox"/>	Complete part 3 toolkit request form (project lead or RDS team can support with this). <input type="checkbox"/>
	Organisational governance sign-off. <input type="checkbox"/>	
	Publish toolkit. <input type="checkbox"/>	Check published toolkit on web and app. <input type="checkbox"/>
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6. Implementation, evaluation and maintenance	Maintenance and development of toolkit. <input type="checkbox"/>	Follow up evaluation and feedback at agreed timepoints e.g. 6 months. <input type="checkbox"/>
	Communication and implementation support, such as piloting or training. <input type="checkbox"/>	
	Follow up evaluation and feedback at agreed timepoints e.g. 6 months. <input type="checkbox"/>	