

Questing Your Way to a Knowledge Mobilization Strategy

Doing research that is useful and used

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About the Authors

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Christopher Yordy, a PhD student in the School of Public Policy and Administration (SPPA) at Carleton University, worked as an economist/consultant in s the Middle East and North Africa. He is interested in alternative methodologies for community engaged scholarship. As an avid supporter of student organizations and food movements, he has written on the social change processes associated with food policy, poverty and hunger in Canada. The ability of students and youth to take initiative in growing their own food, local food purchasing movements, and critically examining the economics of food abundance and scarcity, are a constant source of inspiration for Christopher's multiple research passions.

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The Knowledge Mobilization (KMb) field is fraught with a dizzying array of terminology and concepts, leaving researchers and their community partners unsure about what KMb means in their situation. Our purpose in this document is to demystify the process of developing a KMb strategy. We devised this resource to leverage project partner strengths in developing a practical, focused, and outcome-based KM strategy.

Knowledge mobilization means doing what makes sense in order to increase the use and usefulness of your research. What makes sense is context specific depending on the nature of the research, the audience, and the use to which the knowledge will be put. We suggest you push yourselves to go beyond the conventional academic publication and conference presentation. Note we say go beyond not replace. Rigorous methodology and peer reviewed publications have value. Taking it beyond means exploring other methods highlighted in later sections of the article to increase the availability, accessibility, audiences interested in the topic. Underpinning KMb is the idea that research/knowledge needs to lead to action. The research findings are the start not the end.

We are pleased to share this KMb strategy development resource for participatory social science research, which has been adapted from Barwick's^{*} template on strategies for health research. Developing a KMb strategy, as with all strategic development, requires thoughtful planning. To facilitate this planning, we created questions to help you identify and analyze important elements in developing a KMb strategy.

KMb exists at all stages of research with the mix of activities changing according to the stage, needs and context. In the early stages the focus is more likely to revolve around building awareness of your project and the issue, developing connections, establishing engagement, and knowledge exchange. Engagement remains a focus throughout the research. Knowledge creation grows out of the engagement and knowledge exchange activities Activities used in participatory action research (PAR) can simultaneously be part of the KMb strategy. For example, bringing together a group of people experiencing poverty to understand what they would want from research fulfills both a KMb and PAR needs. KMb in the final stages builds on the relationships, networks, and stakeholder/audience understanding to move the research results into action. Revisiting the strategy during each stage has value. Taking an integrated approach no matter what the type of research can only strengthen the quality and usefulness of the research. Ideally, thinking about KMb starts when the thinking about the research starts.

An important way to think about setting up KMb monitoring and evaluation at the outset or partway through a community-led process is to consider the four R's: Reach, Relevance, Relationship and Results. **Reach** relates to the number, variety, and extent of your connection to

^{*}Adapted with permission from: Barwick, M. (2008-2011). *Knowledge Translation Planning Template -Revised*. Toronto, ON: Hospital for Sick Children. <u>www.melaniebarwick.com/training.php</u>



your desired audience. How many different perspectives and how deep into a particular community do you reach? **Relevance** relates to how applicable and meaningful your research is to an audience. **Relationship** includes the wide variety and types of relationships to be built and maintained to support reach, relevance and results. **Results** are about the actual use of your research and what outcomes occur from its use.

Knowledge Mobilization Purpose: Research to Action

(AKA: knowledge transfer, knowledge translation, dissemination and information science, research integration and implementation, K*)

Potential Focus of KMb by Phase of Research Knowledge mobilization occurs during every phase of research.			Research Users and Uses (Examples)
Inception and	Implementation	Outcome	Research Users:
Design		Achievement	Policy makers
			Program designers
Stakeholder Analysis	Creation	Creation/Co-creation	Researchers
Audience	Co-creation	Transfer/Translation	Practitioners
Analysis	Exchange	Dissemination	Media
Community	Community engagement	Publication	Patients
engagement	User engagement	Advocacy	General public
User engagement	Brokering	Audience Analysis	
Brokering	Network and	Community and user engagement	Research Use:
Network and	relationship building	Brokering	Citation, evidence, decision-making,
relationship	ounding		advocacy, program and service design,
building		Network/relationship	change in practice, behaviour change, policy
		building	design and change, keeping informed, social inclusion, social justice, social innovation
Evaluation and	Monitoring: Reach, R	elevance, Relationship, Res	sults

Your answers to the following questions will give you a solid basis to write a KMb strategy that works for you and your audiences and stakeholders. There are no rules for using this resource. These questions are your guide to help "work all the corners" in considering what will be most



relevant to your particular needs. In addition, your answers don't need to be 100% 'right'. Knowledge mobilization is an iterative process. You implement actions based on your best knowledge, test the reactions and outcomes, then adjust according to the results.

You may find that some components are not necessary for your initiative or that there are additional components you want to include. (Please let us know what those are!) Think of this resource as an iterative process throughout your initiative; revisiting these questions as your context shifts and corresponding plans evolve. We look forward to hearing your feedback on this resource and stories about your quest for the elusive KMb strategy!

Now, on to questing the way to a KMb strategy!

Project Background

Provide a brief history and background to your research project. How did it come into being? What drove your interest in the project? What issues does it address?

What knowledge will your research produce?

Starting with your research questions, define what knowledge or evidence you will create through your research. You may revise this statement as your research progresses and you begin to have evidence. The usual "will add to the body of knowledge" is not enough. Think about who could use the knowledge and how and in what context they would use it.

What outcomes do you hope for from your research?

In other words, how can the knowledge produce be used, by whom? What difference could it make? What do you hope to change through your research? What do you see as the short, medium, and long-term outcomes from your research? When you complete the research will you be able to answer the questions: **What** have we learned? **So what** does it mean to whom? **Now what** now needs to happen?

What is the environment in which your research will take place?

What is happening around you that can help or hinder uptake and use of your research organizationally, economically, politically, socially, sectorally? Are you in front of the wave, just ahead, behind? Is your issue potentially controversial? Who is working on similar issues? What already exists? Are there commonly held beliefs that your research may contradict?

Force field analysis (see resources) is a useful tool for considering the factors that will influence the outcomes such as trends, events, popular option. It can also help identify potential allies as well as those who may resist the evidence.



Who cares about the findings? Who should care? What difference could the knowledge make? Who has the power to make the decisions or the changes?

Identifying and connecting with specific audiences or stakeholders for your research at the beginning will significantly enhance the potential for creating research that gets adopted and used. Who are the people who would be interested in the results from your research, who has the power to influence change, and who could feel impact of the results? Some possibilities include: other researchers, practitioners, policy makers, service providers, media, community advocates, funders, government organizations, post-secondary institutions administrators, individuals experiencing the situation you are researching, not for profit organizations, etc. Stakeholder analysis is a useful tool for thinking through and prioritizing your audiences and stakeholders.

What do you know about your audience/stakeholders that will help you make your research relevant to their needs?

What is the context of your audiences/stakeholders? What is important to them? How does your research relate to their interests? In what way and to what extent would they like to be involved in your research design? In what ways would they want to use your findings? (*e.g.* policy decisions, practice improvement, community change, individual change, evidence for change, *etc.*). For each of your audiences/stakeholders think through the following:

• Level of Engagement: What is the necessary level of engagement at each stage of the research (design, implementation, outcome achievement?) What level of engagement would they be interested in? How critical are they to your success and how critical are you to theirs?

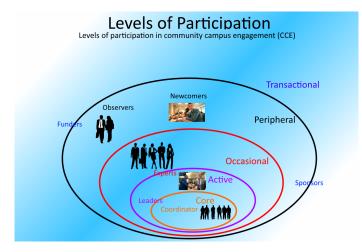
You will likely find that the level of engagement with specific audiences will vary during the various stages of you project. Having multiple layers of engagement is normal and desirable.

- **Core Fully Engaged:** a relatively small group of people whose passion and engagement energize and nurture the research community
- Active participants: are recognized as practitioners and define the community (though they may not be of one mind as to what the community is about)
- **Occasional participants:** only participate when the topic is of special interest, when they have something specific to contribute, or when they are involved in a project related to the research project.
- **Peripheral participants:** have a sustained connection to the community, but with less engagement and authority either because they are still newcomers or



because they do not have as much personal commitment to the practice. These people may be active elsewhere and carry the learning to these places. They may be part your network with valuable connections to other networks thus enabling broader communication both out and in.

• **Transactional participants:** outsiders who interact with the community occasionally without being members themselves, to receive or provide a service or to gain access to artifacts produced by the community, such as its publications, its website, or its tools.



Adapted from: Wenger Traynorhttp://wenger-trayner.com/wp-content/uploads/2011/12/11-12-Levels-of-participation-600.jpg Graphic adaptation: Anthony Maki

Take time to consider the various levels of engagement and think about where you would place your current partners. Are there any you would wish to be more engaged? What could encourage them to engage more fully?

- Nature of relationship: What is your current relationship? Are they people you work with as colleagues, subordinates or managers? In what ways do you currently interact? What level of credibility do you have with them?
- **Connecting:** In order to connect with potential audiences you need to know where they get their information, what sources they're likely to trust, what types of formats will catch their attention, what type of evidence they value and use, and their level of understanding of the issue.
- **Research relevance:** in what way does your research relate to their interests and goals? How could your research have an impact on their goal achievement? In what way would they use your research? To do what? Understanding how they will use the research is one of the most powerful tools you have to create the type of mobilization product or activity



that fits best their needs. You may also indicate what they require in terms of evidence from your research in order to use it.

• **Goal:** What do you want them to do as a result of your research? In what way do you want them to use it? (*e.g.* Raise awareness, inform, engage, inspire to action, change policy, practice, behaviour, decide on a course of action).**How will your reach your audiences?**

The Social Sciences and Research Council suggests that knowledge mobilization consists of four aspects: knowledge creation, knowledge exchange, knowledge dissemination and knowledge brokering. This is one way to organize your thinking around KMb activities to use. Below we've provided a table that provides concrete examples of each aspect.

Exchange	Brokering	Creation	Dissemination
Workshops	Inform	Dialogue	Social Media
Conferences	Link	Collaborative	Websites and Blogs
Mentoring	Match make	Development	Presentations
Networks	Engage	Sessions	Videos
	Collaborate	Consultation and	Arts: Visual, Auditory
	Build Adaptive	Engagement	and Theatre
	Capacity	Community Building	Training
		Activities	Plain language
		Co-development of	extracts
		products and activities	Policy Briefs
		-	Research Papers

What techniques will you use to engage your audiences?

Numerous techniques exist for knowledge creation, knowledge exchange, or knowledge dissemination, some of which are outlined at the end of this section. Choose techniques based on the purpose they are to fulfill and the audience needs. The type and level of interaction will depend on whether you are developing awareness, imparting knowledge, exchanging or creating knowledge, or generating action such as policy, practice, or behaviour change. Your audiences' characteristics will determine the format and media used. One of the wonderful things about knowledge is that it can be reused infinitely without losing its value in multiple versions and venues. Strive towards a mix of products and activities to mobilize your knowledge.

The phase and your type of research will determine the type and timing of the knowledge mobilization activity. For example, if you are involved in participatory action research then you will likely begin your design phase using direct involvement of your stakeholders through highly interactive engagement activities. If you are following a less participatory style of research, the design phase may have less interaction. However, even if you are planning to focus on end-of-



research knowledge mobilization, it makes sense to fully understand the potential use and users of your research in the design phase. You may do this through consultation or literature reviews. By understanding your audience context, needs, and information use you can design your research in ways that will help them to effectively use your research.

Below is a scattering of ways and means of mobilizing knowledge. Feel free to add to it. Spend some time thinking about the advantages and disadvantages of using each technique. Which audiences would the technique be useful for? Would the technique be best for extending reach or relevance? Would it enhance awareness? Would it encourage in depth thinking? Would it enhance depth or breadth of reach? Is it a practical tool to assist in implementation? Using multiple techniques in a layered approach can help the breadth of reach and utilization keeping in mind that different audiences have different needs, interests, and ways of using information. Sometimes it's important to start by catching attention and interest with visual products that link to more extensive analysis. For example, once you have written the final paper several products can be developed such as an infographic to raise awareness, a policy brief to convince government officials?, a presentation that can be used by a policy maker to engage senior management in an idea, a graphic novel or video to inform, a workshop to engage different audiences can all be used and, more importantly, can be used in tandem. An infographic goes out on Twitter, and links to a graphic novel or video, which can link to the final paper or to an invitation to an in person workshop. The types of techniques you use in what configuration depends on your message and your audience. We encourage you to try out multiple techniques and observe their effect.

Medium	Examples
Face to face (Presentation, poster, storytelling, networking, postcards, brochures)	Conferences/Symposia/ Congress Field of Study Conferences Summits (<i>e.g.</i> Manning, Broadbent) KMb Forum, \UK KMb Forum <u>Open Space ConferenceSearch Conference</u> User engagement Networks Associations Communities of practice
Engagement Techniques	Consultation, Process design, Outcome mapping, Asset mapping, Interviews, focus groups, Charettes, and many more.
Web-based	Websites, Blogs, Webinars, TED Talks, Communities of Practice, Networks, Associations, Word of Mouth, Vines (30 second videos).
Social Media What is the nature of social media used by your audience? International audiences use a different set of social media than North America. Demographics of the users of particular social media platforms changes quickly and dramatically. Do some research on your target audience.	To name only a few: Facebook, Twitter, Linked In, Youtube, Instagram, Vineo, Slideshare Viral (word of mouth in the virtual world) Other social media platforms Which social media does your audience use?

Knowledge Mobilization Examples by Media Type



Medium	Examples
Print What is the nature of print publications used by your audience? In what ways can you use both print and web? Given your audience, what are the advantages/disadvantages of print?	Journals, Magazines, Newspapers, Newsletters. Posters, Books, Policy Briefs, Fact Sheets
Television/Radio Are there programs that are heavily related to your issue? Are there programs or types of programs of interest to your audience?	News News magazines Integrated into popular shows
Graphics/Visual Art In what ways can you use graphics and visual art to engage or inform?	Infographics Graphic Novels Concept Clouds Images Postcards Brochures Comic strip cartoons
Performance What examples of performances as KMb can you think of?	Theatre E. g. Paper Wheat) Dance (Dance your thesis)
Considerations What other ways are there to look at the knowledge? What are some of the barriers that exist for people to use the knowledge? What can you do to overcome them? Trust, power dynamics, building and maintaining relationships, reputation all need to be considered.	Plain language Digital Divide Accessibility- Adaptive Technologies Cultural competence-cultural humility Guerilla marketing

What resources and skills are required to use the knowledge mobilization techniques and how will you ensure they are available?

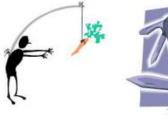
Think about the resources and skills available to your research team through your organization and partners. Do you have the resources required or will you need to hire expertise? For example, if you think a graphic novel will speak most effectively to an intended audience, do you have the skills to create and effective one, or do you know people who do?

How will you know you're successful?

Choose an evaluation framework that enables formative and summative evaluation. For example, many not-for-profit organizations use developmental evaluation to learn and change along the way. Measuring impact generally means giving time for adoption, use, and impact from the use. Recognizing that achieving impact hinges on multiple precursors will enable you to check progress towards achieving outcomes and through them impact. Reach, relevance, and relationship are important precursors to adoption and use of research. The adoption and use of a piece of research hindered by failure to make connections, demonstrate the relevance, or develop the relationships and credibility. Therefore, assessing the reach, relevance, and relationship aspect of your research process has value beginning in the early stages of your research. Below are some suggestions for indicators you may wish to use.



Evaluating Knowledge Mobilization Reach + Relevance + Relationship = Results



Reach: Are we connecting with the people and organizations needed?



Relevance: To what extent does our KMb fit the needs and interests of our audiences and stakeholders? Is it useful and used?



Relationship: To what extent are we achieving the depth, breadth, and quality of engagement needed?

Results: Are we making a difference? To what extent is KMb contributing to the desired outcomes of CFICE?

Reach: Web or print: # distributed, # visits, # attendees, # downloads, # retweets, media uptake, # new members or venues

Relevance: # read or intend to read, use & usefulness assessments, return visits or attendance, comments, referral to others.

Relationship: Social network growth and participation, participation in conversations and meetings, contributions to project.

Results: How can you know what has happened as a result of your research? Qualitative evaluation such as outcome mapping, most significant change, case studies, practice or service change (observed changed, reported change, intent to change, documentation, feedback process measures, and impact of changes made.

A Word about KMb Strategies and Funding Applications

The requirement to provide a knowledge mobilization strategy as part of a funding application is standard from research councils as well as many foundations. The content you generate from the above questions will likely be more detailed than that required for one page many grant applications allow, but the thinking you have done will enable you to describe who you will connect with, by what variety of means, to what end. Your one pager will be all stronger from summarizing the key points of your comprehensive strategy.

The three research councils collaborate closely. The nature of their mandate means their perspectives on knowledge mobilization differ though all have a research to action focus. Each



have resources on their websites to assist you with knowledge mobilization related to their research funding.

KMb Perspectives of Research Councils

(Social Sciences and Humanities Research Council (SSHRC), Canadian Institute of Health Research (CIHR), Natural Science and Engineering Research Council (NSERC)



Conclusion

Some final thoughts: Use your initial strategy as a guidepost and living document. Be on the lookout for unanticipated opportunities, and above all don't be afraid to cancel a planned activity if the context or situation changes. You can create work plans from the strategy by determining who, will do what, by when, with what resources. When considering your findings you may wish to consider three basic KMb questions: *what* (the findings), *so what* (what do they mean to the particular audience), and *now what* (what action is indicated)?

We'd love to hear from you about your plan, challenges, and successes. You can reach us through contact us on <u>www.thecommunityfirst.org</u>.



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 etc.): A concept paper emerging from the K* conference held in Hamilton, Ontario,
 Canada, April 2012. Retrieved from:
 http://inweh.unu.edu/archive/documents/KStar ConceptPaper.pdf

Resources

Background on knowledge mobilization

Expanding our understanding of K* Concept Paper and Case Studies <u>http://inweh.unu.edu/wp-</u> content/uploads/2013/05/KStar_ConceptPaper_FINAL_Oct29_WEBsmaller.pdf

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Models of KMb

http://www.oise.utoronto.ca/rspe/KM_Products/Conceptual_Frameworks/index.html#LavisCanE fforts



KMb Strategy Resources

Building a KM Strategy - York University http://www.slideshare.net/KMbYork/building-a-knowledge-mobilization-strategy

<u>U of T- Building a KM Strategy Workshop</u> <u>http://www.oise.utoronto.ca/research/UserFiles/File/Amanda%20Cooper%20Building%20KM%</u> 20Plans%20UT%20Final%20Post%20Version.pdf

Integrated Knowledge Mobilization: how to support collaborations for co-production of knowledge http://melaniebarwick.com/document/Scientist_Knowledge_Translation_Plan_Template_Sept% 2020_2011_Fillable_Form.doc

Building Knowledge Mobilization Strategies http://www.knaer-recrae.ca/images/resources/Info%20Sheets%20Building%20KM%20Plans.pdf

How to create personas for your website http://www.usability.gov/how-to-and-tools/methods/personas.html

Research based guidelines to web site development - A very detailed, sourced set of guidelines <u>http://guidelines.usability.gov/</u>

<u>10 Principles of Website design - A blog piece on 10 principles of web design</u> <u>http://uxdesign.smashingmagazine.com/2008/01/31/10-principles-of-effective-web-design/</u>

Saskatchewan Health Research Foundation –KT Strategy http://shrf.ca/Knowledge%20Translation

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http://yorkspace.library.yorku.ca/xmlui/bitstream/handle/10315/10236/Phipps%20SRC%20Field %20Note%202011.pdf?sequence=1

Phipps, D. J., Jensen, K. E., & Johnny, M. (2013). KT planning template: Clear language research summaries. *Scholarly and Research Communication, 4*(1), 1-17. Retrieved from: <u>http://src-online.ca/index.php/src/article/viewFile/44/119</u>



Knowledge Mobilization Networks

Research Unit for Research Utilization http://www.ruru.ac.uk/

<u>York University Knowledge Mobilization Unit</u> http://www.yorku.ca/research/innovation/knowledgemobilization/

Knowledge Mobilization Institute http://www.knowledgemobilization.net/

Canadian KT Community of Practice http://www.ktecop.ca/

Canadian Knowledge Mobilization Forum 2013 http://www.knowledgemobilization.net/archives/2109

Ottawa KT Community of Practice http://www.meetup.com/OttawaKTECoP/

<u>Mobilize This</u> http://researchimpact.wordpress.com/

Living Knowledge- Network of Science Shops http://www.livingknowledge.org/livingknowledge/

<u>CIHR KT and Commercialization-Significant resources for KT practice</u> http://www.cihr-irsc.gc.ca/e/29418.html

Research Impact LinkedIn Group

http://www.linkedin.com/groups/New-Knowledge-Mobilization-Journal-Club-1969705.S.5826316616962449410?view=&srchtype=discussedNews&gid=1969705&item=582 6316616962449410&type=member&trk=eml-anet_dig-b_pd-ttl-cn&fromEmail=&ut=1Be4BD-V4rBS41

Research to Action http://www.researchtoaction.org/

Institute for Community Engaged Scholarship http://www.theresearchshop.ca/about

Knowledge Network for Research in Education http://www.knaer-recrae.ca/

London School of Economics Impact of Social Sciences http://blogs.lse.ac.uk/impactofsocialsciences/about-the-project/

Implementation Science Journal



http://www.implementationscience.com/

<u>Global Network for Research Integration and Implementation</u> http://www.linkedin.com/groups/Global-Network-Research-Integration-Implementation-4888295?trk=my_groups-b-grp-v

Engagement

Introduction to Engagement http://www.researchtoaction.org/live/wp-content/uploads/2014/02/Introduction-to-Stakeholder-Engagement.pdf

Levels of Engagement (image)

http://www.idealware.org/articles/engagement-pyramid-six-levels-connecting-people-and-socialchange

Carleton video of Bessa Whitmore on the benefits of Community Service-Learning http://www.youtube.com/watch?v=RdyzxtRJAbw

Seeds of Fire, Social Development in the Era of Globalism Elizabeth Whitmore, Maureen G. Wilson

Activism that Works. Fernwood Press. 2011 Avery Calhoun, Elizabeth Whitmore, Maureen G. Wilson

Mount Sinaï Community Engagement Framework http://www.mountsinai.on.ca/about_us/community-development-integration/Community-Engagement-Framework.pdf

Community Engagement : A Summary of Theoretical Concepts http://www.albertahealthservices.ca/poph/hi-poph-surv-comm-phids-engage-concepts.pdf

Community Engagement Toolkit : Social Planning Council of BC http://www.google.ca/url?sa=t&rct=j&q=&esrc=s&source=web&cd=11&ved=0CCUQFjAAOA o&url=http%3A%2F%2Fwww.sparc.bc.ca%2Fcomponent%2Frubberdoc%2Fdoc%2F534community-engagementtoolkit.pdf&ei=FG7oUsLCH6PwyQGFyYCABw&usg=AFQjCNFvo4W3IY9inmJ1UHx39_RN EDp3UA

Community Engagement : Tamarack

http://tamarackcommunity.ca/g3s1.html (note: table of contents in right hand navigation column) Approaches to Measuring More Community Engagement http://tamarackcommunity.ca/downloads/index/Measuring More Community Engagement.pdf

Engagement Marketing - How does this differ from engagement from a reseach /KMb perspective?



http://en.wikipedia.org/wiki/Engagement_marketing.

Strategic Influence: Having Positive Impact without Direct Authority http://www.teamstarproject.org/pdf/Strategic%20Influence.pdf

Participatory Action Research Toolkit http://www.researchfororganizing.org/

Research Council Links

NSERC http://www.nserc-crsng.gc.ca/index_eng.asp

SSHRC http://www.sshrc-crsh.gc.ca/home-accueil-eng.aspx

CIHR http://www.cihr-irsc.gc.ca/e/193.html

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