Building a Knowledge Mobilization Strategy

David Phipps, Executive Director
Research & Innovation Services
Overview

1. Check in on Knowledge Mobilization
2. Building a KMb plan for a research project – strategic framework
3. Case Study
4. Report Back
5. Evaluation
KMb Summary

1. Confusion around terminology

2. At the basis of K Mb is the **two-way exchange** processes. It is all about relationships and engagement.

3. **Co-production** distinguishes K Mb from:
   - Knowledge Translation & Transfer (often thought as one way push)
   - Knowledge Exchange (which does support active two-way exchange)

4. **Impact** is measured at the level of partners
Evidence

Facilitation

Context
(partners/receptors)
Knowledge Mobilization Research Planning

What is Strategy?
A Plan to Fulfill the Goals

www.knowledgemobilization.net

Knowledge Mobilization Works
Knowledge Mobilization & Research Planning

Where does strategy fit?

Using Evidence
Acknowledgements

Adapted by research and development from:

Dr. Melanie Barwick
The Hospital for Sick Children, Toronto

and

Dr. Donna Lockett
KT Consultant
Knowledge Translation Planning Template®

INSTRUCTIONS: This template was designed to assist with the development of Knowledge Translation (KT) plans for research but can be used to plan for non-research projects. The Knowledge Translation Planning Template is universally applicable to areas beyond health. Begin with box #1 and work through to box #13 to address the essential components of the KT planning process.

<table>
<thead>
<tr>
<th>(1) Project Partners</th>
<th>(2) Degree of Partner Engagement</th>
<th>(3) Partner(s) Roles</th>
<th>(4) KT Expertise on Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>researchers</td>
<td>from idea formulation straight through</td>
<td>(1) What do the partner(s) bring to the project?</td>
<td></td>
</tr>
<tr>
<td>consumers - patients/families</td>
<td>after idea formulation &amp; straight through</td>
<td>(2) How will partner(s) assist with developing, implementing or evaluating the KT plan?</td>
<td></td>
</tr>
<tr>
<td>the public</td>
<td>at point of dissemination &amp; project end</td>
<td>Action: Capture their specific roles in letters of support to funders, if requested.</td>
<td></td>
</tr>
<tr>
<td>decision makers</td>
<td>beyond the project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>private sector/industry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>research funding body</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteer health sector/NGO</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>practitioners</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>other</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**NOTES**

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http://www.melaniebarwick.com/training.php
KMb Planning Template – 13 steps

1. Identify Partners
2. Partner Engagement
3. Partner Roles
4. KT Expertise
5. Knowledge Users
6. Main Messages
7. KT Goals
8. KT Strategies
9. KT Process
10. KT Impact & Evaluation
11. Resources Required
12. Related Budget Items
13. Implementation
KMb Research Planning Template – 13 steps

13 Steps into 4 Main Headings

**Engagement** (steps 1-5)
- Who are your audience(s)/collaborators

**Goal** (steps 6, 7)
- What are you going to accomplish (objectives)

**Activity** (steps 8, 9, 11, 12)
- How are you planning to do this (activities)

**Impact and Accountability** (steps 10, 13)
- What will result from this work, and how will you demonstrate it.
Step 1 – Project Partners

- Researchers
- Public / Consumers
- Decision Makers (org, comm, govt)
- Policy Makers (govt, comm)
- Private Sector
- Funding Body

Brokers Bits

York U Knowledge Brokers can help identify collaborators for a research project.

Leveraging the national network, we can help find research expertise from across Canada.
Step 2 – Partner Engagement

Option A
- Initial – from conception to grave

Option B
- Early - After conception to grave

Option C
- End - Dissemination / Project End only

Option D
- Beyond the project (ongoing, extended)

Brokers Bits

What does the term ‘partner’ mean to you? Is your expectation clear and consistent with those you’re collaborating with?

Be explicit from the beginning. Meaningful engagement requires honest, respectful dialogue.
Step 3 – Partners Roles

See #2 and #8

How will partners assist in developing, implementing or evaluating the KMb plan?

What do partners bring to the table?
Step 4 – KMb Expertise Needed?

Lots of options to consider:

- Researcher with KMb expertise
- Consultant with KMb expertise
- Knowledge Broker / Specialist
- Organizational KMb support
- KMb support within the partner organization
- Project Manager with KMb responsibility

Brokers Bits

So why a dedicated knowledge broker?

Sometimes, simply creating knowledge/products is not good enough.

Brokers can help move knowledge into action using an array of tools and activities, tailored to the needs of your audiences.
Step 5 – Knowledge User Audiences

What audiences will you target?

- Researchers
- Practitioners / Service Providers
- Public
- Media
- Consumers
- Decision Makers
- Policy makers
- Private Sector / Industry

What audiences will you prioritize?

Brokers Bits

This is an important element to consider.

Understanding your audience(s) will help shape the work you will do.

Not all audiences want to receive information the same way.
Step 6 – Main Messages

What messages do you anticipate sharing?

- Briefly, what your research/project seeks to:
- You can consider this for multiple audiences
Step 7 – KMb Goals

Are you seeking to:

Generate
• Awareness
• Interest
• Practice change
• Behaviour change
• Policy Action

Impart
• Knowledge
• Tools

Inform
• Research
• Policy
• Practice

Brokers Bits

Always consider the ethical and legal principles in your KMb efforts.

Consider goals for each audience group you’re engaging.
Step 8 – KMb Strategies

What KMb methods/activities will you use?

- Broker / KMb Specialist
- Research Summaries
- Website / IT
- Multi stakeholder collaboration
- Mass Media Campaign
- Financial Intervention/Incentive
- Performance Feedback
- Capacity Building / Training
- Peer Reviewed Publication
- Conference
- Social Media Tools
- Others...

Brokers Bits

York has structured their activity into three streams:

- People – capacity building, internships, and educational efforts
- Spaces – creating space for people to meet and interact
- Projects – user generated collaborative project
Step 9 – KMb Process – when will KMb occur?

See Step 2: partner engagement

Option 1

• Integrated KMb – researchers and research users will shape the research process (setting questions, methodology, tools, analysis, dissemination...)

Option 2

• End of Grant KMb – KMb activities are employed once the project is completed
How will you evaluate impact?

- **Reach Indicators**
  - Copies Distributed
  - Copies Requested
  - # downloads, hits, visits
  - Media Exposure

- **Usefulness Indicators**
  - Satisfied With
  - Usefulness of
  - Changed Views
  - Gained Knowledge

- **Use Indicators**
  - # intend to use
  - # adapting the information
  - # using to inform policy/practice

- **Partnership Indicators (#’s)**
- **Others**
Step 11 – Required Resources

What resources do you require?

- Human
- Financial
- IT
- Web
- Leadership
- Management
- Workers
- Board
- Volunteer
- Others
Step 12 – Budget Items

Identify budget items related to your plan

- Knowledge Broker
- Project Manager / KMb Specialist
- Clear Language Writer
- Web development / IT
- Travel
- Workshops / Venue
- Public Relations
- Web 2.0 (social media)
- Others
Step 13 - Implementation

Describe how you will implement your KT strategy(s): What processes/procedures are involved? If practice or behaviour change is the focus, how will you ensure the knowledge (intervention) you are transferring retains quality, fidelity, sustainability?
K Mb Research Planning Template – 13 steps

now what?

13 Steps into 4 Main Headings

**Engagement** (steps 1-5)
- Who are your audience(s)/collaborators

**Goal** (steps 6,7)
- What are you going to accomplish (objectives)

**Activity** (steps 8,9,11,12)
- How are you planning to do this (activities)

**Impact and Accountability** (steps 10,13)
- What will result from this work, and how will you demonstrate it.
# Knowledge Mobilization Planning Table

<table>
<thead>
<tr>
<th>Activity</th>
<th>Targeted Audiences (engagement)</th>
<th>Rationale</th>
<th>Key Outcomes (goals)</th>
<th>Outcome Indicators</th>
<th>Desired Impact (accountability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>KM in the AM</td>
<td>Community leaders, practitioners, researchers</td>
<td>Building trust, proven KMb activity</td>
<td>Brokered research and KMb relationships</td>
<td># people, # meetings; sustained conversations; satisfaction/usefulness survey</td>
<td>Community-university projects (1yr); Informed decisions (5yr)</td>
</tr>
</tbody>
</table>
‘Tools’ for building a KMb / KT Strategy

KMb Strategy Table
1. Activity (and matching audiences)
2. Outcomes (and outcome indicators)
3. Impact (and desired timelines)

Summary (paragraph or page)
- Who are your audience(s)/collaborators
- What are you going to accomplish (objectives)
- How are you planning to do this (activities)
- What will result from this work, and how will you demonstrate it (monitoring and evaluation)
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