A report of the CHSRF knowledge brokering workshop
held in Montreal on October 2, 2003
This document is available on the Canadian Health Services Research Foundation web site (www.chrsf.ca).

For more information on the Canadian Health Services Research Foundation, contact the foundation at:
1565 Carling Avenue suite 700
Ottawa, Ontario
K1Z 8R1
E-mail: communications@chsrf.ca
Telephone: (613) 728-2238
Fax: (613) 728-3527

Ce document est disponible sur le site web de la Fondation canadienne de la recherche sur les services de santé (www.fcrss.ca).

Pour obtenir de plus amples renseignements sur la Fondation canadienne de la recherche sur les services de santé, communiquez avec la Fondation :
1565, avenue Carling, bureau 700
Ottawa (Ontario)
K1Z 8R1
Courriel : communications@fcrss.ca
Téléphone: (613) 728-2238
Télécopieur: (613) 728-3527
CHSRF
2003 KNOWLEDGE BROKERING WORKSHOP REPORT

A report of the CHSRF knowledge brokering workshop held in Montreal on October 2, 2003
Table of Contents

Main Messages .................................................................................1

Knowledge Brokering:  
A Journey of 1,000 Miles Begins with a Single Step ...........3

The Journey Unfolds ......................................................................6

What The Voyage So Far Has Revealed ................................. 8

The Downside Down Under .........................................................11

Conclusion: Going Along for the Ride ........................................13
Main Messages

Destination: knowledge brokering. The road map is faint, the best route debatable, but the journey’s guaranteed to be fascinating, according to Australian Peter Cottingham, guest speaker at the Canadian Health Services Research Foundation’s brokering workshop in Montreal in October.

Mr. Cottingham spoke to just under 100 people at the CHSRF Knowledge Brokering Workshop 2003. One of the goals of the workshop was to increase the understanding of brokering with a front-line account from Mr. Cottingham, a knowledge broker for Australia’s Co-operative Research Centre for Freshwater Ecology, a partnership of 19 organizations interested in protecting and sustaining use of one of that country’s rarest resources, water. The workshop was also meant to drive discussion of the implications of a recently released paper. The paper combined the results of both a 2002 national consultation with people involved in knowledge brokering, and an extensive multidisciplinary literature review on brokering. Workshop participants were asked to answer two questions. First, what should the foundation do to further develop its knowledge brokering network? Second, which knowledge brokering skills did they feel they lacked? What training would be useful to them?

Mr. Cottingham is one of those rare people whose business card actually says “knowledge broker.” He’s held the position at Australia’s Co-operative Research Centre for Freshwater Ecology for more than five years, and the details of Mr. Cottingham’s work as a knowledge broker captivated the audience. He explained that knowledge brokers were added to the co-op’s staff because, despite member commitment to using research to guide policy and practice, it wasn’t getting used optimally.

It was clear that many workshop participants were looking for some pretty concrete directions on how to train for knowledge brokering and how to run the job once they’d got it. They have been disappointed. “We see it as a journey unfolding,” Mr. Cottingham said. He and his colleagues don’t like the idea of a rigid job description. In fact, the co-op has 11 brokers, and the job of each is dictated by context: the needs of the decision makers, political overtones, the nature of the problem on the table. The satisfaction in the job...
doesn’t come from a steady climb up a ladder of success, but from the excitement of continuously learning, Mr. Cottingham said. He could, however, offer some advice on how to be an effective knowledge broker based on his years in the job so far:

**Always start with the question ‘Why?’**

Projects work best when the goal is clear. A broker can assemble better teams and develop better research questions when it’s clear what information is needed and who can help.

**Synthesize, don’t go for one-offs**

Decision makers usually need answers fast so the co-op’s brokers focus on synthesizing information, rather than developing new research. Keeping up with research developments is crucial.

**Trust me**

People want information from sources they trust; they’re more receptive and less afraid to admit what they don’t know. Mr. Cottingham is an employee of the University of Canberra but works in the office of Melbourne Water, one of the co-op’s decision-making partners. He’s a familiar figure, there when a problem arises.

**Tool kit**

There is no substitute for a solid exchange of ideas between researchers and decision makers. A broker can help this happen, equipped with these skills:

- solid technical knowledge of the field;
- being a good listener;
- being able to bring people together and help them connect;
- training, or a natural talent for mediation and communications; and
- never being afraid to admit you don’t know.

The foundation has launched the knowledge brokering pages on its website (www.chsrf.ca) and is reviewing other options for supporting a knowledge brokers’ network, based on discussions that followed Mr. Cottingham’s presentation.
Knowledge Brokering: A Journey of 1,000 Miles Begins with a Single Step

What’s Next for the Canadian Health Services Research Foundation’s Knowledge Brokering Network?

The Canadian Health Services Research Foundation has promoted knowledge transfer since it was established in 1997. In 2001 it added another dimension to its work when it launched its knowledge brokers initiative. Brokering is the active, relationship-building aspect of knowledge transfer, a third-party role dedicated to linking researchers and research users so information, innovation and support can flow freely between them.

In 2002, the foundation held a series of meetings across the country to consult with people involved in knowledge brokering, and released the findings from that consultation in 2003, in a paper called The Theory And Practice Of Knowledge Brokering in Canada’s Health System. The paper was background reading for those who attended the CHSRF Knowledge Brokering Workshop 2003, held in Montreal at the beginning of October. The purpose of the meeting was two-fold: to discuss the ramifications of the paper and to increase our understanding of brokering with a front-line account from Peter Cottingham, a knowledge broker for Australia’s Co-operative Research Centre for Freshwater Ecology, a partnership of 19 organizations interested in protecting and sustaining use of one of that country’s rarest resources, water.

During the 2002 consultations we discovered, first, that very few people doing brokering in Canada have, or expect to have, the title and sole job responsibility of knowledge broker. Instead, the focus is on people incorporating knowledge brokering activities as part of other work and we changed our approach to the subject accordingly.

The paper also reflected a general feeling among those consulted that knowledge brokering needs more support and acknowledgment to reach critical mass. Only then will it become a wide-spread practice, accepted by managers as an essential part of evidence-based decision-making for the health system and be accorded planning and financial support.
Key to reaching critical mass, it was made clear, is continued support from the foundation for the growing network of knowledge brokers in Canada. As well, the paper also defined a list of skills and characteristics of knowledge brokers. Together, the need for a network, and the skills and characteristics of knowledge brokers were the focus of a discussion at the CHSRF Knowledge Brokering Workshop 2003.

Irving Gold, the foundation’s assistant director of knowledge transfer, and leader of the brokering initiative, asked the 86 participants at the meeting to discuss two questions. First, what should the foundation do to further develop the knowledge brokering network? Second, which knowledge brokering skills did they feel they lacked? What training would be useful to them?

The debate was enhanced by Mr. Cottingham’s presentation on real-life brokering, which preceded it. His experiences, in building relationships, the scramble to keep up with knowledge, the isolation and hostility one sometimes feels, were echoed in some of the calls for training in conflict resolution, mediation, and facilitation.

The skills brokers need to work were described in the consultation paper, among them a talent for bringing people together and facilitating meetings; the ability to assess evidence; communication skills and; marketing. Some people, it was noted, are born with relevant skills. Others can learn or enhance them and training in all those areas was called for at the Montreal meeting. In addition, participants called for other learning opportunities, including:

- Case studies
- Organized exchanges, for researchers and decision makers to spend time in each others milieus;
- Knowledge management, including training in how to capture tacit or institutional knowledge;
- Research synthesis;
- Team building;
- Tool kits of best practices;
- Reviews of failed practices; and
- Project management
The day after the Montreal meeting, a workshop on assessing research was offered and Mr. Gold told participants that a workshop on policy making is planned for a later date. Because travel budgets are limited, one participant suggested workshops should be taken on the road.

Canada’s geography is also a factor in people’s ideas for building the brokers’ network. The emphasis was on electronic communication, including:

- Listing participants by region and by specialty interests in a directory on the website;
- A web-based discussion forum, or promotion of the Canadian Research Transfer Network listserve;
- Regular updates on brokering ideas from the foundation and other types of electronic bulletins;
- A list of resources for knowledge brokers; and
- An archive of listserve discussions, so the shared knowledge is not lost.

However, participants also said face-to-face meetings are needed to set the foundation for electronic networks. Future meetings could be enhanced if people all submitted their best practices beforehand and they were circulated by the CHSRF. Training was also seen as an important aspect of establishing networks.

Mr. Gold pointed out that most of the ideas for electronic networking have been built into the knowledge brokering pages on the CHSRF website, although work building the site is continuing. He added that the foundation would start working on other ideas raised as soon as the meeting was over. Not all can be done at once, but, to borrow Mr. Cottingham’s most compelling image, the journey will begin.
The Journey Unfolds

Peter Cottingham travelled almost 17,000 kilometres to speak at our meeting in Montreal. His message? Knowledge brokering is a journey, not a destination. Learn to enjoy the trip.

Mr. Cottingham is one of the rare people who carries the title “knowledge broker” on his business card, and was the principal speaker at the Canadian Health Services Research Foundation’s October 2003 workshop on knowledge brokering. His purpose was to introduce Canadians involved in health-system research transfer to the life of a working knowledge broker.

What we learned was encouraging for some — knowledge brokering can help relations between researchers and decision makers flourish. But others, those who are looking for a hard and fast model, a template to copy, were probably disappointed to be told there is no simple route to success in knowledge brokering.

A knowledge broker for more than five years, Mr. Cottingham told his audience there can be no standard definition of what knowledge brokering is; the job is different in every context. “We see it as a journey unfolding,” he said. “We like the uniqueness of it and we certainly don’t want to come up with some sort of uniform approach, or vision or position description about what a knowledge broker should be.”

Background

The Co-operative Research Centre for Freshwater Ecology was created to respond to a water-supply crisis in Australia, the world’s driest continent. Dams, irrigation projects and development have led to serious degradation of inland waterways and their natural ecology to the point that salt and algae sometimes render water undrinkable. Some major rivers run dry before they reach the sea. Approaches to water management imported from other parts of the globe have failed Australia. Home-grown researchers had ideas on how to manage water better; the need and the will existed to do so and led to the creation of the Co-operative Research Centre, an unincorporated group of 19 organizations, ranging from government ministries to water management boards to university-based environmental and ecological researchers.
It turned out, however, that naming the problem and setting up a structure to deal with it was not, in itself, the solution. At best, decision makers knew to whom to complain that they still weren’t getting the research they needed to help them do their work.

A tough struggle to understand followed; it laid the foundation of knowledge brokering. The researchers had to find out why valuable and useful knowledge wasn’t getting into the decision-making process. Were the messages wrong? Did an engineer-dominated industry not understand ecological issues? Was the researchers’ perspective irrelevant to decision makers? Were the ideas badly presented? To find the answers, they realized, they would have to work from the decision makers’ perspectives, enter into their culture and learn to understand how decisions are made.

The solution, as Mr. Cottingham’s business card attests, was the creation of knowledge brokers. There are now 11 brokers working in the co-operative; like our speaker, they are all housed in decision-maker organizations, not employed by them, but working there, to learn the culture, to be available as soon as problems arise, to make by their presence a visible commitment to building and keeping open lines of communication between researchers and decision makers. Although, as Mr. Cottingham stressed, the job is different for every person and context, there are common points that have been noted over the years, similar problems and effective solutions.
What The Voyage So Far Has Revealed

Why?

The background of how his job was developed, having to figure out what wasn’t working in the original researcher/user relationship, likely laid the groundwork for Mr. Cottingham’s single most important piece of advice to the Montreal audience: always ask the question *why*. It’s where he begins every project, he told the audience, so he is “very clear…about what it is we want an as outcome in dealing with an issue.” With the outcome clear, he has a better chance of getting the right people involved in achieving it, whether they are researchers or end users of information. And research users must *always* be part of setting the research agenda, the co-operative has found, so the right questions are asked and there is no temptation to make transfer a one-way process of pushing research onto users when it doesn’t really suit their needs.

We need it now

The knowledge brokers know decision makers want answers quickly. That’s a disadvantage, because it tends to lead to a lot of short-term fixes for long-term problems, but it’s also an opportunity. People are most receptive to outside solutions from research when they have a big problem on their hands. The knowledge broker should be enough in touch with the organization’s needs and culture to know when that crisis moment comes, and to seize it.

Trust

Working closely with decision-maker organizations (ideally, working *within* them) is also important at that crisis moment. A knowledge broker who is on the scene is more likely to be trusted, which is crucial to knowledge brokering. Brokers need to trust the researchers they ask for information and the decision makers they turn to for guidance on the nature of a problem; decision makers need to trust the brokers to find answers. Researchers need to trust the time and effort they invest will pay off and that brokers are hooking them up with the people who can help them make a difference.
Trust isn’t automatic. Mr. Cottingham’s experience is that in any new organization a smallish group is very welcoming, while a larger proportion is willing to be persuaded that a knowledge broker will be useful. But there tends to be a hostile group who fear their intellectual property will be appropriated. Mr. Cottingham tries to win trust, starting with supportive people and doing some quick fixes on manageable issues that will prove the value of brokering.

**Idiots have their place**

Most people are lazy researchers. They look for information only as long as it takes to find that seems a plausible answer. It may not be the best, but people don’t like exposing their ignorance by asking someone they don’t know for help. A broker offers the chance of going to someone they know and trust, rather than some guru who may think only an idiot would ask the question. (Although Mr. Cottingham notes admitting you’re an idiot “is a really powerful tool.” Experts, far from being contemptuous, appreciate being asked for advice.)

**Synthesis**

Knowledge brokers in the co-op have learned to focus on synthesis of information. Decision makers don’t want to be told the results of one study. They want big-picture answers, a broader review of knowledge and context. The co-operative also found that their work went better when they moved away from funding small, individual projects. Communication and knowledge-sharing among researchers started working much better when larger, multi-disciplinary projects became the focus of the co-op’s work.

**Clarity**

Decision makers are doers; among co-op members the tendency has always been to build another dam, their variation of the classic instinct to find a solid treatment for a symptom, instead of solving the real problem. That’s partly a question of training; building is what engineers do. But it’s also the result of a culture clash. Researchers have a tradition of arguing the meaning of everything; to the outsider, this comes across as a tidal wave of conflicting advice. The reaction from a decision maker, Mr. Cottingham said, is “If these people can’t agree between themselves, what hope have I got of taking on board this information and using it productively?” It’s the job of knowledge brokers to make it clear that much of what
researchers dispute with each other is marginal to their main ideas, where likely 99 per cent of the information is agreed and can be acted on.

**The skill set**

After more than five years, brokers at the co-operative have defined a set of skills that echo pretty closely what the Canadian Health Services Research Foundation outlined after its national consultation. Mr. Cottingham emphasizes the need for technical knowledge; he is a researcher himself and sees that as a starting point for efficient transfer of complicated science. Communication skills and talent as a facilitator are important but don’t have to be gained through formal training. “I’d like to think what I’m best at is developing working relationships with people rather than producing lots of glossy brochures or being a terrific orator. It’s good people skills, the ability to sit down and have discussions. Some of my best outcomes have come from one telephone call after sitting down over a cup of tea.” Listening and patience are crucial for building relationships, he said. A love of knowledge, so that every issue is stimulating to explore, helps.

**Complementary Activity**

Brokers in the co-operative are not a substitute for researchers doing their own knowledge transfer. Some researchers are better at it than others, but if a researcher has joined the co-operative, it is in the understanding that transfer is part of the job and transfer must be built into every research project. The brokers help transfer knowledge and build relationships, but ideally, the relationships flourish to the point where the broker becomes unnecessary.

**Links**

Bringing people together is the most crucial element in the work of a broker. It can be done many ways, casually over a cup of tea, at a problem-solving or training workshop, or at a carefully constructed meeting where the participants have been chosen and the agenda shaped to reach a goal. Mr. Cottingham also likes less-structured meetings where people get together a few times a year, to keep in touch and share new ideas.
The downside down under

Time flies

The culture of the decision makers Mr. Cottingham works with, their need for quick solutions, makes for a very dynamic work place, where flexibility and responsiveness are key. But that makes it difficult to accomplish longer term goals. They try to plan but often spend their time on ad hoc responses to problems as they arise.

Politics is always a factor

The management of scarce recourses is always politically charged and water in Australia is no exception. The success of the co-operative’s work is affected by the environmental policies of parties in power — and organizational politics have a lot to do with setting priorities, such as where brokers work and what they work on.

Measuring success

In such an active environment, where demands for answers take precedence over considering the abstracts of knowledge transfer, assessing the impact of their work is something they rarely find time for. Mr. Cottingham said they need to reflect more on what works best.

Capturing knowledge

The co-operative has also been too busy to focus on knowledge management, the effort to capture experience, knowledge and connections that are in people’s heads, but rarely noted down. As the idea of knowledge brokers catches on, the risk is they will be hired away, taking not only their experience, but a vast body of corporate knowledge with them. The organization is just starting to look for ways to record and share that tacit information so wheels aren’t reinvented and working relationships aren’t disrupted by the arrival of a new knowledge broker who doesn’t know what’s gone on before.
Isolation

It can be difficult to work in an external environment. An employee of the University of Canberra, Mr. Cottingham actually works 650 kilometres away at the Melbourne Water office. He is cut off from his colleagues and is a kind of outsider in his daily workplace. It’s crucial to connecting with decision makers but it can leave a feeling of isolation. It can also be hard to keep up with research developments. Australia, like Canada, is a big country. Getting together with people is time-consuming and expensive. On the plus side, you’re a long way from office politics.
Conclusion: Going Along for the Ride

Hearing about the daily professional journey of a working knowledge broker was clearly fascinating for the Montreal audience. His focus on learning the new research, rather than formally pursuing skills to make him a better broker was a definite challenge for a crowd seeking guidance in starting this new, ill-defined career; somehow, having “people skills” and knowing the moment to offer a chat did not seem to be concrete enough career advice. As well, the challenges the co-operative faces in brokering for its 19 member groups apparently made some people feel the task of brokering knowledge in the Canadian healthcare system might be unconquerable.

But reaction was mostly positive. It was so clear, listening to Mr. Cottingham, how having brokers on site, every day, shows decision makers researchers are serious about transferring their knowledge. The information that more and more organizations want their own brokers is clear evidence they believe the freshwater co-operative’s initiative is working. Even the fact that Mr. Cottingham thinks it might be time for him to move on from Melbourne Water is a sign of success for an audience, because the message is the links among researchers and decision makers there are so well-established, they don’t need him on site any more.

Finally, it was clear to all how rewarding the job can be. Mr. Cottingham told us the feeling he’s “gorging at a smorgasbord of knowledge” is one he never tires of. And when he goes to some of the beautiful sites his work is helping to preserve, he has tangible evidence of the importance of his work.
OUR PURPOSE

Vision
Our vision is a strong Canadian healthcare system that is guided by solid, research-based management and policy decisions.

Mission
Our mission is to support evidence-based decision-making in the organization, management and delivery of health services through funding research, building capacity and transferring knowledge.

Approach
Our focus is on the people who run the health system, as well as health services researchers. We help them get involved in research that makes a difference, help them produce, find and apply new knowledge to improve management and policy decisions, and bring the two groups together so they can each influence each other’s work and share ideas and experiences.

NOTRE RAISON D’ÊTRE

Vision
Notre vision est celle d’un système de santé canadien fort qui est guidé par une gestion et des politiques solides, fondées sur la recherche.

Mission
Notre mission est d'appuyer la prise de décision fondée sur les données probantes dans l'organisation, la gestion et la prestation des services de santé par l'entremise de programmes de financement de la recherche, de développement des capacités et de transfert de connaissances.

Approche
Nous visons les gens qui dirigent le système de santé de même que les chercheurs des services de santé. Nous les aidons à participer à des recherches qui font une différence, puis à produire, à trouver et à appliquer de nouvelles connaissances qui amélioreront la gestion et les décisions des responsables de politiques. Nous réunissons ensuite les deux groupes afin qu’ils puissent exercer une influence mutuelle sur leurs travaux et échanger des idées et des expériences.