Summary Report of Knowledge Brokering Workshop
September 30 - October 1, 2004

Partners:
Canadian Health Services Research Foundation
Atlantic Regional Training Centre
Children’s Health Applied Research Team, UPEI
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Introduction

As Hellstrom, Maimquist, & Mikaelsson (2001) state, knowledge brokering means organizing events which promote networking, the sharing of information and connecting those with knowledge and experience with people who require knowledge for informed decision making. Knowledge brokers have a unique role in promoting and facilitating research based decision making. They are an unrecognized groups of processionals who often undertake knowledge brokering as part of their workload. The ability to build networks, marketing, researching and critical analysis are essential skills for an effective knowledge broker.

Organizers felt that the Knowledge Brokering Workshop, held September 30th to October 1st, would provide individuals with an opportunity to learn how to share information and put people with knowledge and experience in touch with those you need it. This workshop was designed to identify knowledge brokers in the region, recognize the challenges faced by knowledge brokers, and promote a regional network of knowledge brokers. Forty-five individuals participated in the workshop. These individuals, from health, education, and university communities, were brought together and given the opportunity to talk about knowledge brokering.

This workshop was sponsored by the Canadian Health Services Research Foundation, Atlantic Regional Training Centre, and Children’s Health Applied Research Team, UPEI.

The Canadian Health Services Research Foundation (CHSRF) supports the evidence-based management of Canada’s healthcare system by facilitating knowledge transfer and exchange - bridging the gap between research, healthcare management, and policy. Knowledge transfer and exchange is collaborative problem-solving between researchers and decision makers. A leader in knowledge transfer and exchange since its inception in 1997, the foundation’s model of effective knowledge exchange involves interaction between decision makers and researchers and results in mutual learning through the process of planning, disseminating, and applying existing or new research in decision-making (www.chsrf.ca).

The mandate for the Children’s Health Applied Research Team (CHART) is to conduct scholarly research that will improve the lives of children on PEI and impact on other parts of the country. This mandate was founded of an overarching principle to empower, enrich, and strengthen the development of children, their families, and the Island community in general (www.upei.ca/vpacadev/research/res_chart.html).

The Atlantic Research Training Centre is a collaborative venture of Dalhousie University in Nova Scotia, Memorial University of Newfoundland, the University of New Brunswick, and the
University of Prince Edward Island. These are comprehensive institutions with broad based scholarly capacity which constitute the largest and most influential research settings in Atlantic Canada. Through the sharing of resources, and building upon complementary strengths, our goal is to be an internationally recognized and vibrant applied health services research training program which ensures an active cohort of highly trained interdisciplinary investigators in Atlantic Canada who are competitive in national and international research (www.arte-hsr.ca).
Mr. Irving Gold, Assistant Director for knowledge transfer for Canadian Health Services Research Foundation (CHSRF), presented the present state of knowledge brokering in Canada. The presentation was factual and engaging, and set the tone for the workshop by stimulating great discussion around knowledge brokering. CHSRF envisions a strong Canadian healthcare system that is guided by solid, research-based management and policy decisions. Its strategy is to establish and foster linkages between decision makers and researchers with great emphasis on knowledge exchange.

Mr. Gold was careful to distinguish knowledge exchange from dissemination of knowledge. Dissemination does not equal knowledge exchange. In fact, the majority of readers find published results of research confusing. To use research, decision makers require easy access to research results which are synthesized, of high quality, relevant, comprehensible and effectively presented.

Mr. Gold emphasized that effective knowledge exchange is about collaboration between researchers and decision makers. Knowledge brokering can build and nurture this exchange of knowledge and can guide a process of joint knowledge production. CHSRF has created a formal network of knowledge brokers and hosts National and Regional workshops to bring these brokers together with researchers and decision makers. Prince Edward Island was the first to host a regional workshop on knowledge brokering. The CHSRF brokering program has been developed and encompasses four elements: literature review, role of knowledge brokers, support through networking and pilot projects. The pilot projects are being established throughout Canada to test the hypothesis that knowledge brokering is a useful way to encourage and increase the effectiveness of knowledge transfer activities.

See Appendix C for PowerPoint presentation.
Key Aspects of Knowledge Brokering

The first session looked at key aspects of knowledge brokering. The facilitator Sister Elizabeth Davis was born in Fox Harbour, Newfoundland and entered the congregation in 1966. After teaching high school (1969 to the early 1980s), she became Assistant Executive Director at St. Clare’s Mercy Hospital in St. John’s, Newfoundland, becoming Assistant Medical Director and then Executive Director both in 1986. In 1994 she was appointed President and CEO of the Health Corporation of St. John’s until beginning her studies in 2001 at Regis College.

Sister Elizabeth currently serves as Commissioner for the Royal Commission on Renewing and Strengthening Newfoundland and Labrador’s Place in Canada. She serves on many boards and committees in the public sector, including the Rhodes Scholarship Selection Committee, the Medical Council of Canada, and the Canadian Health Services Research Foundation. She holds a BA and BEd from Memorial University, an MA (Theology) from the University of Notre Dame, and completed an MHSc in Administration at the University of Toronto in 1985, winning six major awards, scholarships and fellowships. In addition to other awards, Sister Elizabeth was given a Doctor of Laws honorary degree from Memorial University in 2002.

Sister Elizabeth Davis stressed the importance of involvement in the workshop discussions. She emphasized that the valuable connections made, throughout the day, would help foster new ideas and that by transferring research to policy new knowledge is created.

Sister Elizabeth Davis asked participants to shape a vision about where knowledge brokering is going and explore the pragmatic tools needed to get there. Workshop participants broke into round table discussion groups to explore the following two questions:

1. What knowledge brokering am I doing every day in my work now?

2. If Atlantic Canada got it right (in terms of knowledge brokering), how would it look? How do we get to a better level of knowledge brokering?

After the discussion groups completed their task, the main points were shared with the larger group. The suggestions that were made are discussed in further detail within the Building an Atlantic Canadian Network section of this report.
Communication and Leadership

This session explored the communication and leadership required for effective knowledge brokering. Mr. Alan Buchanan, the facilitator of this session, has recently joined the Bristol team as an associate on Prince Edward Island. Alan has more than twenty years experience as a senior executive in both the private and public sectors. Most recently he has been Director of Communications and Public Affairs for Aliant, specializing in government relations.

Prior to joining the private sector Mr. Buchanan enjoyed a twelve year career in government and academia. He was a lecturer in Public Administration and Political Studies at UPEI and a Senior Policy Advisor to the government of Prince Edward Island. He was twice elected to the Legislative Assembly of Prince Edward Island and served as the province’s Minister of Health and as the Minister of Provincial Affairs and Attorney General.

A professional and seasoned communicator, Mr. Buchanan has expertise in all aspects of public affairs and corporate communications - government relations, internal and external communications, media and public relations, as well as strategic and business planning. Mr. Buchanan is a sought after lecturer and motivational speaker as well as a storyteller, featured at a number of festivals and events and aired on regional and national radio.

Alan Buchanan suggested that in knowledge brokering it is imperative to share stories as that is how information is distributed. There is a need to recognize and understand the skills that are essential in supporting effective knowledge brokering and implementing change.

Mr. Buchanan chose to use the health care field to help explain the importance of traditional knowledge (lore). Knowledge brokering has been practiced for many years. In the past, treatments and cures for diseases were passed from person to person informally. A story about a little girl with pleurisy, which took place in the 1920's, was shared with the workshop participants. The girl was scheduled to have an operation and on the day of the surgery, as the doctor was prepping her, she got physically ill. The doctor was surprised by this and later learned that the girl’s original doctor had not informed her mother that the girl was not to eat before the operation. There had been no communication between the two doctors. After the operation, it was more the members of the community that kept updates on the girl’s health. This example illustrates both the importance of communication and that at one time, the onus fell more on the community to help and inform each other about illness and treatments.

After Mr. Buchanan’s oral presentation, round table discussions took place. Each table
explored the qualities of leadership and communications that are essential to knowledge brokering and Mr. Buchanan facilitated the creation of a categorical overview of the traits identified.
Network Building and Liaising

Over the lunch break workshop participants had the pleasure of listening to Penelope Rowe. Penelope, the CEO of the Community Services Council, Newfoundland and Labrador - a social development, research, planning and service organization. She is also the Director of the Values Added Community-University Research Alliance.

Throughout her career Ms. Rowe has been a leader in the social policy community in Canada. As a social entrepreneur, activist, planner, researcher and advocate she has provided leadership in shaping public policy and establishing community programs. She is dedicated to advancing the linkages between social and economic development; and, promotes the role and contribution of the voluntary, community-based sector and its relationship with governments.

For many years she advocated the development of a framework for social policy development and was instrumental in encouraging the Government of Newfoundland and Labrador to embark upon its groundbreaking strategic social planning process. In 1993 she was invited to work with the Strategic Planning Group of Deputy Ministers and in 1996 she was appointed by the Government of Newfoundland and Labrador to chair the Social Policy Advisory Committee.

She was educated at the London School of Economics; Emerson College, Boston Mass. USA, and Memorial University of Newfoundland. She was named by Chatelaine Magazine as one of Canada’s 50 most influential women; by Atlantic Business Magazine as one of the regions top 50 CEO’s, and is a member of the Order of Canada.

During her presentation Penelope Rowe suggested that there had been an explosion of knowledge in recent years. Policy makers need to develop a knowledge brokering system in where this knowledge can be linked and accessed from a variety of angles. However, policy makers have very different views in regards to the length of time it takes to implement new strategies and networks. This is also true of the individuals who advise the policy makers which makes progress more difficult. The gap between policy makers, researchers, and community members needs to be narrowed.

There are number of things that effect knowledge brokering process. A few were mentioned, including the fact the community members play a strong role in influencing policy and transferring knowledge. The media is also part of the knowledge brokering process as it is often used to communicate information and get the message across. It has been suggested that
part of knowledge brokering should be anticipatory. The knowledge brokering process has to be able to anticipate what knowledge will be needed and plant seeds of knowledge that will inform later decisions.

Ms. Rowe suggested that in order to build a network, people need structured thinking and the ability to see beyond their own domain to help raise the bar of progress. Networks need specific desired outcomes, support, as well as opposition, within the network.

See Appendix E for Penelope Rowe’s PowerPoint presentation.
Building an Atlantic Canadian Network

The session in the afternoon focused on building an Atlantic Canadian network. The facilitator, Sister Elizabeth Davis took feedback from her introductory presentation and produced a follow-up session. During this session, Sister Davis suggested that individuals need to broaden their way of thinking in regards to knowledge brokering. It is beneficial to have a diverse group of people at the table waiting to discuss ideas. These individuals include: policy makers, community members, consumers, researchers, and media personnel.

Sister Davis suggested that networking should embrace a multilayered, interdisciplinary approach. It is not a linear process. Networks are built by sharing collective experiences and having face to face interactions. In order for these networks to have long term success, the knowledge brokering that is happening now needs to be validated and more time needs to be allotted for knowledge brokering activities. National funding and the recognition of what has been accomplished are also issues that need to be addressed in relation to knowledge brokering.

During Sister Elizabeth Davis’ presentation, a variety of elements associated with knowledge brokering were identified and suggestions were made regarding what types of programs need to be created. The suggestions from improvement included: a training center for knowledge brokers, story telling centers, a network of knowledge brokering professionals, early involvement of policy makers in research planning and development, and mentoring programs.

Sister closed the workshop with an Irish Blessing and was hopeful that some of the ideas discussed during the workshop would help move the agenda of knowledge brokering forward in Atlantic Canada.

See Appendix D for PowerPoint presentation.
Next Steps

Before the workshop participants were dismissed for the day, a number of recommendations for further actions were made. Representatives from the Children’s Health Applied Research Team of UPEI stated that they would investigate the possibility of an ACOA proposal, a Listserv, and the development of a working group.

Workshop participants proposed that enlisting senior management support and ARTC would help expand and create a larger network. Participants also stated that an increase in stakeholders representation would be beneficial.

The implementation of formal education in relation to knowledge brokering was recommended. Participants felt that a research course or practicum on knowledge brokering (including mentor-ship) would help individuals entering the field gain knowledge and understanding.
Appendix A
Letter of Invitation
Dear Colleague,

The Children’s Health Applied Research Team (CHART) and the Atlantic Regional Training Centre (ARTC), in collaboration with the Canadian Health Services Research Foundation, are pleased to invite you to an Atlantic Region Knowledge Brokering Workshop to be held in Charlottetown, PE on September 30th and October 1st, 2004. Attached you will find an invitation with more details, registration information and a draft agenda.

CHART is a team of researchers who have come together at the University of Prince Edward Island around children’s health issues and who share a common interest in their concern for the well-being of children. The interdisciplinary nature of this group of researchers results in the development of strong provincial and national research networks. ARTC is a collaborative venture of Dalhousie University in Nova Scotia, Memorial University of Newfoundland, the University of New Brunswick, and the University of Prince Edward Island. Through the sharing of resources and building upon complementary strengths, the goal of this organization is to be an internationally recognized and vibrant applied health services research training program which ensures an active co-hort of highly trained interdisciplinary investigators in Atlantic Canada.

The Atlantic Region Knowledge Brokering Workshop provides you with an opportunity to:

- identify knowledge brokers in the region;
- share your ideas about knowledge brokering;
- participate in professional development in key aspects of knowledge brokering
- identify the challenges faced by knowledge brokers and promote a regional network of knowledge brokers.

Knowledge brokering has been defined as, “Knowledge brokering means organizing events which promote networking, the sharing of information and connecting those with knowledge and experience with people who require knowledge for informed decision making” (Hellstrom, Malmquist, & Mikaelsson, 2001). Knowledge brokers have a unique role in promoting and facilitating research based decision making. They are an unrecognized group of professional who often undertake knowledge brokering as part of their workload.

This is a must-attend workshop if your job includes knowledge brokering, or if you would like to incorporate knowledge brokering into your organization. To register for the workshop, please contact Bev Gerg at bgerg@upei.ca or at (902) 894-2842.

Kindest regards,

Vianne Timmons, PhD                   Kim Critchley, RN, PhD
Vice - President, Academic Development  Associate Professor, School of Nursing
University of Prince Edward Island     University of Prince Edward Island
Appendix B
Knowledge Brokering Workshop Agenda
# Agenda

**Knowledge Brokering Workshop 2004**  
**Charlottetown, Prince Edward Island**

## Thursday, September 30th
### Inns on Great George, 58 Great George Street

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:00 – 7:15 pm</td>
<td>Introductions and Greetings</td>
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</tbody>
</table>
| 7:15 – 8:15 pm | Irving Gold  
*The Present State of Research in Knowledge Brokering* |
| 8:15 – 10:00 pm | Wine and Cheese                                                       |

## Friday, October 1st
### Rodd Charlottetown Hotel, 75 Kent Street

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 9:00 am</td>
<td>Coffee and Welcome</td>
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</table>
| 9:00 – 10:15 am | Interactive Session facilitated by Sister Elizabeth Davis  
*Key Aspects of Knowledge Brokering* |
| 10:15 – 10:45 am | Coffee and Nutrition Break                                           |
| 10:45 am – 12:00 pm | Interaction Session facilitated by Alan Buchanan  
*Communication and Leadership* |
| 12:00 – 12:30 pm | Speaker – Penelope Rowe  
*Network Building and Liaising* |
| 12:30 – 1:30 pm | Lunch                                                               |
| 1:30 – 2:45 pm | Interactive Session facilitated by Sister Elizabeth Davis  
*Building an Atlantic Canadian Network* |
| 2:45 – 3:15 pm | Closing Remarks                                                     |
Appendix C

PowerPoint Presentation - Irving Gold

The Present State of Knowledge Brokering in the Canadian Health Services Community
The present state of knowledge brokering in the Canadian health services community

Irving Gold
Assistant director, knowledge transfer

Knowledge brokering in Atlantic Canada
September 10, 2004
Charlottetown, PEI

Our vision

A strong Canadian healthcare system that is guided by solid, research-based management and policy decisions

Our mission

To support evidence-based decision-making in the organization, management and delivery of health services through: funding research, building capacity, and transferring knowledge

Our strategy

To establish and foster linkages between decision makers (managers and policymakers) and researchers in the governance of the foundation and in the design and implementation of programs to:
- support research
- develop researchers and
- transfer knowledge
CHSRF objectives

1. To enhance the quality and quantity of research that responds to the needs of health system decision makers (direct funding of research and capacity development within the research community)
2. To get needed research into the hands of health system managers and policy makers in the right format, at the right time, through the right channels (dissemination)

CHSRF objectives – cont’d

3. To help health system managers, policy makers and their organizations to routinely acquire, appraise, adapt and apply relevant research in their work (capacity development within the decision making community)
4. To bring researchers and decision makers together regularly to understand each other’s goals and professional culture, influence each other’s work, forge new partnerships (Linkage and Exchange)

Which means a great emphasis on...

- Knowledge Transfer
- Knowledge Mobilization
- Knowledge Translation
- Knowledge Exchange

A secret...

From knowledge transfer to
knowledge exchange!!!

CHSRF’s view of knowledge exchange

- Outcome
- Collaborative problem solving
- Linkage and exchange
- Mutual learning at all stages of research

The first 5 years (1998 – 2002): supply

- Fund research
- Build capacity in health services research community
- Creating spaces and contexts for Linkage and Exchange
- Dissemination
A couple of words about dissemination...

- Dissemination ≠ Publication in journals
- Dissemination is an active approach

Language, Science and Understanding

<table>
<thead>
<tr>
<th>Journal</th>
<th>Lexical Difficulty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell (Biology journal)</td>
<td>38.9</td>
</tr>
<tr>
<td>Nature (Science journal)</td>
<td>31.5</td>
</tr>
<tr>
<td>Scientific American</td>
<td>11.0</td>
</tr>
<tr>
<td>New Scientist</td>
<td>4.0</td>
</tr>
</tbody>
</table>

ENGLISH LANGUAGE NEWSPAPERS

- Discover (popularized science) 4.7
- American adult fiction 19.3
- UK children’s fiction (10-14 yrs) 27.4
- Farm workers talking to dairy cows 90.1

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Anne Lennarson Greer.....

“In all communities the “results” which the majority are watching are not in the distant and confusing findings of the literature but those in their local communities”

Greer AL. “The state of the art versus the state of the science: the diffusion of new medical technologies into practice” Mt J Tech Assess Health Care 1994; 4: 12

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From dissemination to knowledge exchange...

- Dissemination ≠ knowledge exchange!!!

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How is Canada doing with knowledge transfer?

Lavis’ Five Questions On Knowledge Transfer (KT)

- What is transferred?
- To whom is it transferred?
- By whom is it transferred?
- How is it transferred?
- With what effect is it transferred?

Lavis et al., Milbank Quarterly, 2003, 81(2): 221-48

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RESULTS FOR CANADA’S APPLIED RESEARCH CENTRES

Surveyed 175 applied health or economic/social research centres on knowledge transfer (KT)

What is transferred?

- Summaries or synthesis 34%
- Actionable messages 30%

I.e. over two-thirds are still doing knowledge transfer with raw results from single studies
RESULTS FOR CANADA'S APPLIED RESEARCH CENTRES

To whom is it transferred?

- Tailor to target audience: 63%
- Dedicate resources to knowing target audience: 39%
- Build research use skills in target audience: 23%

RESULTS FOR CANADA'S APPLIED RESEARCH CENTRES

By whom is it transferred?

- Dedicated staff for KT: 63%
- KT skill training for staff: 22%
- Knowing the research literature on KT: 21%

RESULTS FOR CANADA'S APPLIED RESEARCH CENTRES

How is it transferred?

- Websites: 91%
- Responses to queries: 63%
- Products for target audience: 60%
- Develop products with target audience: 41%

RESULTS FOR CANADA'S APPLIED RESEARCH CENTRES

With what effect?

- Evaluate impact of knowledge transfer: 12%


- Increase our focus on
  - serving the evidence needs of health system managers and policymakers
  - increasing their capacity to acquire, appraise, adapt and apply relevant research-based evidence

IMPLEMENTING INNOVATION: The Case of Scurvy

The Research:
- 1651: Lancaster shows that lemon juice eliminates scurvy among sailors
- 1747: Lind shows the same for citrus juice

The Implementation:
- 1795 - 194 years after discovery: British Navy first uses citrus juice for its sailors
- 1865 - 264 years after discovery: British Board of Trade uses citrus for its sailors

Mintzler, Science (1985)
What do decision makers need?
- To be able to easily find research or researchers when needed—and know when they have such a need
- Easy access to research results which are synthesized, high quality, relevant, comprehensible and effectively presented
- To be able to incorporate research evidence effectively with other evidence in decision-making processes

The Wisdom of The Late John Eisenberg
"Evidence is an important part, but not the only part of effective decision-making. The use of evidence is most successful when local differences are factored into the decision-making process, whether at the clinical, system, or policy level."
Eisenberg JM. "Globalize the evidence; localize the decision: Evidence-based medicine and international diversity." Health Affairs, 2002; 21(6):167.

Some of what we’re doing
- Self-assessment tool
- Developing processes for the commissioning of research policy syntheses
- Encouraging the development of multi-stakeholder networks
- Increasing theme-based exchanges
- Executive Training for Research Application (EXTRA)
- Developing and supporting the role of knowledge brokers

Finally... to the topic of this session...
- The present state of knowledge brokering in the Canadian health services community

What the policy-makers say
- Review of 24 studies that asked over 2000 policymakers what facilitated or prevented their use of research evidence
- #1 facilitator of research use: personal contact between researchers and policy-makers (13/24)
- #1 barrier to research use: absence of personal contact between researchers and policy-makers (11/24)

What the policy-makers say
Personal two-way communication between researchers and decision-makers should be used to facilitate the use of research. This can reduce mutual mistrust and promote a better understanding of policy-making by researchers and research by policy-makers.
The context
- Effective knowledge exchange is about collaboration between researchers and decision makers
- There are several barriers to this process
- And while we've been preaching to both researchers and decision makers, we have ignored many of these issues

Enter knowledge brokering
- building and nurturing relationships between those involved in joint knowledge production

CHSRF brokering program: 4 elements
- Consult the literature on knowledge brokering in a broad range of disciplines
- Learn what knowledge brokers do in the real world (Canada and abroad)
- Support existing knowledge brokers by creating networking and training opportunities
- Test the hypothesis that knowledge brokering is a useful way to encourage and increase the effectiveness of knowledge transfer activities by creating pilot projects or experiments

The beginning
- Regional consultations across Canada in which we met with close to 200 knowledge brokers working in Canada's health system
- National meeting to confirm findings, create consensus and check assumptions
- Extensive literature review on brokering in a variety of disciplines

Our Canadian tour
- Edmonton, 6th May, 2002
- Saskatoon, 4th Sept, 2002
- Vancouver, 6th Sept, 2002
- Quebec, 13th Sept, 2002
- Ottawa, 10th Sept, 2002
- Toronto, 20th Sept, 2002
- Halifax, 26th Sept, 2002
- Toronto, 14th Nov, 2002

Brokering in the literature and practice
- Brokering is happening
- The term is either not used or misused
- Informal
- Unrecognized and unrewarded
- Full time job done part time
- Few resources
- Virtually no evaluation
- Variety of settings
Overarching tasks and abilities

- Understanding of both the research and decision making environments
- Ability to find and assess relevant research
- Entrepreneurial skills (networking, problem-solving skills, innovative solutions, etc)
- Mediation and negotiation
- Understanding of the principles of adult learning
- Communication skills
- Credibility...

There is no 'one-size-fits-all'

- What brokering entails (skills and activities) will be dependant on the context in which it occurs
- The one constant is the goal of bridging communities which means brokering must be built on a solid understanding of all the relevant environments

Case Study: Cooperative Research Centre for Freshwater Ecology (Australia)

- Postgraduate scientific training and communications experience
- Bring together groups in disparate organizations to cooperate for a common goal
- Help produce knowledge for particular audiences and purposes

CRCFE brokers interact with stakeholders to:

- Understand their needs
- Analyze and assemble required knowledge from existing knowledge bases
- Advise researchers in the formulation and scoping of research projects
- Run workshops for problem-solving, training, etc.
- Produce communication products that synthesize research
- Create other knowledge exchange products such as talks, briefings, and publications
- These individuals are neither researchers nor decision makers!

Structural problems with current brokering efforts

- Highly fragmented – the task is spread out too thinly and among too many people
- The tasks involved in knowledge brokering are largely undefined
- Brokering is often ad-hoc and unrecognized

Structural problems with current brokering efforts

- Erratic funding
- 'Evidence' is largely anecdotal
- Brokering initiatives are often tied very closely to senior management
- Little or no professional development opportunities
What brokers are NOT... (literature and practice)
Brokers are not simply
- Individuals who communicate or move knowledge to those who need it (push)
- Researchers who know how to communicate
- Knowledge transfer workers who synthesize research findings to answer specific questions
- Decision-makers who frequently access research/researchers

Our marching orders
- Create a network of brokers to share knowledge of what works and what doesn't work, identify colleagues, etc.
- Work to trigger the kind of cultural change needed for knowledge brokering to emerge
- Identify and create tools and best practices
- Provide training and education opportunities for existing brokers

Our marching orders
- Help make explicit what is happening implicitly within organizations
- Help organizations recognize and legitimize brokering activities
- Help organizations consolidate brokering activities
- Evaluate the effectiveness of brokering

Create networking opportunities
- The foundation has created a formal network of brokers
- National workshops on knowledge brokering to bring together researchers, decision makers and brokers in order to advance the agenda
  - Smaller invitational workshops for brokers (professional development sessions)
  - Support for regional networks of brokers
  - Virtual and real-time educational opportunities

Pilot projects
- The goal is to test the hypothesis that knowledge brokering is a useful way to encourage and increase the effectiveness of knowledge transfer activities
  - We need to try to generate evidence that knowledge brokering works, find best practices and worst practices...
  - In order to do this, we need to take the risk out of trying knowledge brokering
  - The pilot projects are meant to test the impact of brokering in a variety of settings

Pilot projects (cont)
- The foundation is co-funding a series of demonstration projects in decision making environments to develop, implement and evaluate approaches to knowledge brokering
- Beyond articulating the main principles which need to be respected, we have provided little prescription. The goal is to capitalize on the experiences and innovative potential of those applying for funding
- An evaluation team will work with all successful applicants to ensure that a proper evaluation is possible at the end
Better understanding brokers

- Winslow tool
- Continued search for other brokers
- Other sectors
Appendix D
PowerPoint Presentation - Sister Elizabeth Davis
Present Experience with Knowledge Brokering
PRESENT EXPERIENCE WITH KNOWLEDGE BROKERING

- "Everyone is a broker"
- "Life IS knowledge brokering"
- "Knowledge brokering is action"

- Bringing people together physically and virtually
- Working with stakeholders to determine research needs and priorities
- Re-configuring bits of information to display a whole picture (knowledge?)
- Working with decision makers to interpret research and identify its implications

- Decoding the languages of policy making and research and helping to create a new, more common language
- Promoting research use
- Creating relationships - matchmaking
- Linking researchers to each other to form coalitions / teams

BREAKING CULTURAL BARRIERS BY TEACHING EACH ABOUT THE OTHER
- Thinking outside the BOX

IF ATLANTIC CANADA HAD IT RIGHT, HOW WOULD IT LOOK?
KEY PROCESSES/TOOLS
- ARTC a key resource
- Creation of story-telling circles
- Development of maps of stakeholders re each major policy issue
- Education/capacity-building guidance for those involved
- Identification of best practices in the field
- Variety of channels created for face-to-face meetings
- Plain language and syntheses of research available, “Coles Notes” of research

KEY PROCESSES/TOOLS
- Mentoring
- Research on partnerships
- Networked data bases
- No more “accidental discovery” of knowledge
- Early involvement of policy-makers in research planning and development
- Research findings published in other than academic journals
- Evaluation all along the way

LEADERSHIP SKILLS FOR KNOWLEDGE BROKERS
- Understand political environment
- Understand value system of environment
- Understand technology and outcomes
- Electronic communication skills
- Relationship and capacity builders

LEADERSHIP SKILLS FOR KNOWLEDGE BROKERS
- Authenticity/credibility/ethical
- Passionate about subject matter
- Persuasive approach
- Inclusive nature
- Flexible
- Clear vision
- Linkage/networking skills
- Listening/deciphering
- Clear message taken to appropriate audience
- Push rather than pull leadership

LEADERSHIP SKILLS FOR KNOWLEDGE BROKERS
- Appraisal skills (understand research methods)
- Legitimate understanding of subject
- Entrepreneurial/self the message
- Respectful of all players
- Consult
- Facilitation skills
- Understand subject matter
- Marketing skills
- Critical perspective (three parties – understand needs and impact)

LEADERSHIP SKILLS FOR KNOWLEDGE BROKERS
- Motivator and Leader = communicate
- Management skills (organize, efficient, able to empower)
- Manage conflcting Information
- Recognizer/chalenge status quo
- Patience and Listening skills
- Empathy for community (sensitive to community/culture needs)
- Create navigator
- Networking
- Noisy – naturally wants to seek information
**ACTION FOR CHANGE**
- Bringing opponents to the table
- Take responsibility for advancing brokering
- Circulate and increase information on local brokers list
- Include events/websites in a more formal structure
- Implementing formal education including mentorship
- Proper Atlantic representation
- Wild Idea: knowledge brokering club with an annual parade... a national holiday.

**ACTION FOR CHANGE**
- Talk more about brokering
- Working group based on this workshop
- Listserv re: brokering in region
- Research course/practicum on brokering
- Organize a conference in 2005 with more stakeholder representation
- Storytelling circle: real experiences with brokering
- Wild Idea: Reality brokering show...

**ACTION FOR CHANGE**
- Listserv with mini-bios, linkages, e-mail alerts, etc.
- Formalize and support S$ + content (ACOA)
- Teaching brokering
- Wild idea: bumper sticker: dial 1-800-

**ACTION FOR CHANGE**
- Embed messages about the role of brokering into organizational statements
- Conference (2005) with more stakeholders
- Creation of an Atlantic Canadian directory with all of the stakeholders (students, researchers, DMs, etc)
- Wild Idea: Bring together relevant professions to discuss hat brokering is. Designer dogs..

**ACTION FOR CHANGE**
- Self assessment tool
- Best practices
- Enlist senior management support
- Enlist ARTC
- Establish a multi-stakeholder network
- Expand/create networks of brokers
- Wild Idea: Hold a meeting in the Caribbean

**ACTION FOR CHANGE**
- Distribution of contact information from this meeting
- Slides from presentations to participants
- Continuing interactions between meeting participants
- Collecting and centralizing best practices
- Wild Idea: present research findings via popular theatre
IRISH BLESSING

Peace of the flowing stream be yours,
Water flowing, cleansing and healing.
May you be refreshed.
Peace of the flowing stream be yours.

Peace of the gentle breeze be yours,
Winds blowing, stirring, cooling.
May you breathe deeply.
Peace of the gentle breeze be yours.

Peace of the fertile earth be yours,
Land giving life to diverse creatures.
May you walk on firm ground.
Peace of the fertile earth be yours.

Peace of the twinkling stars be yours,
Lights shining, sparkling, beaming.
May your journey be filled with wonder.
Peace of the twinkling stars be yours.

Diane L. Now, Reizen Blessings
Appendix E
PowerPoint Presentation - Penelope Rowe
Networking and Network Building: Why and How
Knowledge Brokering in Atlantic Canada workshop
Networking and network building: why and how
Penelope M. Rowe
Community Services Council
Newfoundland and Labrador
October 1, 2004

Region on the periphery

Why am I here today?
- Community Services Council
  Newfoundland and Labrador
- Public policy interests
- We promote new ideas & approaches
- Social entrepreneur
- Genetic network builder
- Network extensively outside region

The context for my comments
- "She brought the groups together, wouldn't accept no for an answer, then she did what Penny always does in typical Penny style - she did a study" (Telegram)
- "She is also driven by the process of conceiving new approaches to 'wicked' problems. A tough risk taker with a passion for public policy" (Atlantic Business)

Explosion of information
- Poses serious challenges to ability to capture knowledge needed to do our jobs
- How do we assess sources of information?
- Specifically how to link knowledge to improve health care?
The policy making reality

- It takes forever to influence change
- "Policy development often works on very short term timeframes where window of opportunities open and close very quickly and where agility and a disposition to action are clearly virtues"

(C. Williams, former ADM HPCO)

CHSRF’s definition/agenda

- Knowledge brokering links decision-makers and researchers facilitating their interactions so they are able to better understand each other’s goals and professional culture, influence each other’s work, forge new partnerships and use research-based evidence. Brokering is about supporting EBDM in the organizations management and delivery of health services

Knowledge broker’s environment

- As “go between”
- In role of advocate
-内部化
- Maybe decision makers do not want to be informed
- Cognitive limits
  - Hard to deal with a lot of information

EBDM or DBEM?

Why Bother with relationship building?

- Fragmentation of researchers, policy shapers, advocates, influencers, decision-makers
- False divides amongst producers, users, mediators (brokers)
- Improve policy dialogue & development
- Better policies, practices and services
- Forge communities of interest & practice
- To improve quality of life

Foundations of network building

- To expand dimensions of understanding
- Networks just don’t happen
- Require supportive corporate culture
- Requires concentrated attention
- Challenging and time consuming work
- Takes dedicated effort and resources
- Recognized as legitimate/important function
- Networks must be nurtured & fueled

Steps in building networks

- Network mapping
- Network creation
  - Do you need tailor made groupings?
- Network weaving
  - Get out of silo mentality
- Network facilitation
  - dedicated leadership and mediation
- Think multiple networks
How to build a network
- Identify why you want to network
- Difference between "networking" and a network
- Know what you want to connect and why
- Set goals, objectives & desired outcomes
- Determine inputs
- Go beyond your own domain/discipline
  - Go outside your own group
- Include wide range of people (including potential antagonists & opponents)

Examples of networks
- Person to person
- Internal to agency or institution
- External, wherever you can connect
- Roundtables
- Reference groups
- Online
  - Colleagues, strangers, selected experts, practitioners, public, consumers
- Airplanes, coffee shops, open line shows

Understanding Attitudes to Atlantic Canada
- We're cute but inconsequential
- We have no power to wield in the national scheme of things
- We're always looking for hand outs
- We're isolated and hard to get to
- We're [not] a cohesive region

Opportunities to build upon
- Federal regional councils
- Vast voluntary, community based (non profit) sector
- Universities and colleges
- National organizations, and federal advisory bodies
- Atlantic Premiers Council
- Cities and communities agenda
  - Social infrastructure

Random thoughts
- For transformative ideas go beyond your peer groups
- Seek out new contacts
- Take a broad view
- Avoid "boosterism" in research
- Improving Access to data sources
- Competition for scarce resources
- Deficiency of national surveys
  - Small sample size

Knowledge brokering: red flags
- Who we choose to network with displays and shapes our values
- Whose knowledge do we use/trust?
  - Researchers, anecdotal, practitioners, people
- Who we connect with colours our evidence and identifies our preferences
- How do we know the value of information
- Brokering is an ongoing function
Canada
- "Will against geography" (SSHRC)
- Establishing networks will help to shrink the distance
- Strategic Research Clusters

Atlantic Region Collective Action
- Become our own best friends
- Find our strengths, build on them
- Market – get out and about
- Be in their face
- Break down region the periphery mentality
- Establish exchanges between organizations, positions, regions

Ingredients for success
- Knowledge brokering is intuitive
- Brokering is a social process
- Nimbleness
- Convening place/neutral space
- Include a variety of views
- Horizontal not hierarchical
- Learn how to assess knowledge
- Build and nurture social capital
- Joined up research and policy making

Main Messages
- Be in for the long haul
- It take time to embed new ideas and new ways of doing business
- Embrace risk taking
- Be ubiquitous, accept challenges
- Just because you broker doesn’t mean you will always get your way
- Focus on KB as function not individual
  - Risk in vesting power in one person
- Don’t expect immediate gratification

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Appendix F

Workshop Evaluation Form
Knowledge Brokering Workshop
Charlottetown, PEI
October 1, 2004

Evaluation

1. Has this workshop been helpful?

2. In what setting will you apply the knowledge that you gained today?

3. Do you feel the workshop met its objective of identifying the challenges faced by knowledge brokers?

4. What did you most enjoy about the workshop?

5. What could have been improved?

6. Any other comments?
Appendix G
Workshop Evaluation Comments
Knowledge Brokering Workshop
Charlottetown, PEI
October 1st, 2004

Evaluation

1. **Has this workshop been helpful?**

- Yes, this has been very helpful. I am actually working on a KT project and this workshop has helped to clarify my role as a knowledge broker.
- Very helpful, professional - comprehensive.
- Yes.
- Yes!!
- Yes.
- Yes.
- Yes.
- Yes.
- Yes.
- Yes. It helped develop an understanding of language associated with KB. More of an overview of current understanding of KB would have helped.
- Yes.
- Increased my knowledge of brokering as well as those who already involved in the process.
- Very informative and worthwhile.
- Yes.
- Scale of 1/10: 10/10!
- Yes.
- I hope so, it was certainly pleasant and interesting. Not sure if it has been helpful to me, to my organization.
- Yes - in terms of helping me to get a better grasp on what knowledge brokering is.
- Yes, raised many questions - I’m still searching for some answers.
- Yes, good for getting a fell for the state of thought on subject.
- Extremely.
• Yes, very much.
• Yes!
• Yes - it reinforced what I know.
• Yes.
• Yes, identification and evaluation of the elements of knowledge brokering (KB) was instructive.
• Yes.
• Yes.
• Absolutely.

2. **In what setting will you apply the knowledge that you gained today?**

• I work at the Department of Health but report to a management team involving Dalhousie and the Heart and Stroke Foundation. I also liaise with the district health authorities.
• Federal Department - Government of Canada.
• Academic and institutional
• Informing board of directors about knowledge brokering using self-assessment tool with my organization.
• ARTC and UNB.
• In the workplace.
• Day to day work.
• “Knowledge Brokering” of men’s health in Canada - getting stakeholders together, network, and share information to the public.
• In an arm’s length government agency.
• Research documentation.
• My day to day work.
• In my day to day work.
• My work setting on campus enables me to begin talking to my colleagues about KB.
• Work / university.
• In my teaching, research, and community work.
• In my own work.
• Sorry not sure. I meet thousands of information requests annually - the knowledge brokering price would enhance that role but I’m not sure how to deliver that yet.
• A community-based/academic research project with a mandate to do “research that makes a difference.”
• University to communities.
• Perhaps through the Literacy Research Network. Definitely through the PEI Literacy Alliance.
• Healthcare - Health Authorities.
• Daily practices and interactions.
• In my day to day job, with colleagues, and at our annual conference.
• Part time job (research assistant), thesis work, promotion of ARTC program, creating relationships with media.
• When working with communities to affect change.
• At work to ensure decision-makers have appropriate information - properly packages.
• Networking to form groups with greater and more inclusive expertise.
• Organize my initiating and posting research.
• University setting (eg. students), in future career endeavors (after graduation).
• Networking opportunity to match ARTC students/research with residency placements and decision makers.

3. **Do you feel the workshop met its objective of identifying the challenges faced by knowledge brokers?**

• Yes, I am sure the list will be evolving!
• Yes.
• Absolutely.
• Yes to a degree - but it was a big learning curve for me overall...
• Yes.
• Yes.
• Yes.
• Yes.
• To an extent. It was a diverse group but primarily within the health area - more from other sectors are needed - business for example.
• I don’t know.
• Yes.
• Yes, but I think it also helped identify the benefits.
• Yes.
• To a certain extent, I wish there had been an emphasis on what brokering is and the content of our work.
• Yes - of course.
• Yes. Well done.
• Yes - but more, it addressed the challenging question of whether brokering is a function/process or whether it is more productive to look at brokers as individuals.
• Had a greater focus on identifying kb’s then challenges.
• Yes.
• It was helpful for understanding the context of knowledge brokering in CHSRF, and how change is possible within the area.
• Exceeded.
• Challenges - we don’t like using that word.
• Yes - we could go on about it forever, and it was good to move on to potential solutions.
• I think we all knew these before we came. It was comforting to realize that we all share the same. Now lets move on.
• Yes - great beginning.
• Yes, the workshop did produce a useful definition of KB....Strengths and weaknesses of KB were highlighted by various speakers - Gold, Sister Elizabeth, Rowe.
• Yes.
• Definitely. Great balance of researchers, brokers, and students. Would be helpful to include decision makers.
• The challenges faced and the opportunity to overcome them.

4. **What did you most enjoy about the workshop?**

• All the great people and conversations and the food was awesome.
• Irving and the sister’s great and calming knowledge.
• Organization and remind that we all are change agents in reality we each must embrace/change in this brokering vision.
• Interactive aspect, diversity of group, meeting.
• Ideas on action plans.
• Meeting with practitioners from other constituencies.
• Interactive sessions.
• Interactive sessions very useful - gave everyone a chance to share their point of view.
• Penelope Rowe’s presentation: concrete experiences conveyed well.
• Discussions with colleagues.
• Interactive sessions.
• Connecting with others and understanding of “brokering”.
• The presentations - information. Opportunity to talk to others.
• The people.
• Penny’s talk.
• Irving’s speech on the 30th. Sister’s sessions. Group work and meeting people.
• Irving’s talk, meeting people, seeing other people’s views.
• Penelope Rowe’s presentation.
• Informality.
• Penelope Rowe’s presentation.
• Sister Elizabeth.
• Diversity, interactivity, passion.
• The interactive table sessions.
• Networking, speaker’s ability to synthesize, interaction.
• Networking.
• Interaction - respectful culture facilitators.
• Length of time was about right. Selection of speakers was excellent. Ms. P. Rowe’s presentation was outstanding!
• Penelope Rowe.
• Speaker presentations, networking.
• Networking, presence of CHSRF.

5. What could have been improved?

• A pre-meeting package is nice and some pre-meeting reading.
• Very little.
• Handouts before speakers to help allow note taking, etc.
• Longer - more opportunity to network.
• Move the groups around during the day so there are other interactions, we had 3 library folks.
• Participation from broader community - policy makers, ngo’s, business, etc.
• More context in real-life situations, more examples, etc.
• More time! Could talk more about next steps to move agenda forward.
• Communication and leadership activity.
• Buchanan session needed more focus, structure, and better pacing. Talk is only one way to share - people need time to write and share ideas - also picture making, etc.
• Increased representation from NGO/stakeholders community.
• “Communications” exercise.
• More wine and cheese.
• Penelope’s session had too much information. Irrelevant jokes etc. Wanted more time to discuss issues raised by her.
• This was just fine for a first meeting.
• The “leadership” portion - I did not get a good feel for what “leadership” in the field of knowledge brokering would look like.
• Ways to move forward more clearly identified.
• Identity of KB - not well organized.
• How will this translate into reality? Hard to say - that there is little direction is frustrating but everyone is in the same boat. There should have been more participating by health care administration - we have to convince them/
• More time (selfishly).
• Nothing, great job.
• Food: when having a build it yourself lunch, make sure you have 2 settings of same food to cut down on line up. More interaction time (3 day conference).
• More action toward an outcome and followup.
• The keynote speaker could have been incorporated into the day - not the night before.
• Participant list - format as a table, name, last, first, sort and then affiliation, institution.
• The planning team proved to be as competent as they are lovely. Seriously, I felt it was well done and not lacking. Nice venue for a relaxing atmosphere.
6. Any other comments?

- It was all great!
- Thank you.
- Thank you to the organizers and the many hidden workers. Kudos - Bev, Melissa, Jane, CHART, ARTC.
- Looking forward to the next step....
- Good workshop.
- Great job, thanks especially to Bev, Melissa, and Jane.
- Good job.
- Thank you to the organizers - valuable networking opportunity.
- Thank you so much for this opportunity, I hope it continues.
- Good look at a beginning.
- Need infrastructure to purport the knowledge broker.
- Thanks for taking the initiative to organize this.
- Overall an amazing time!
- Awesome job! Thanks.
- Great job. Wished more prov/federal government employees could have been here.
- Recirculate on paper, email, a Internet detailed contact information on participants: names, email, physical address, job title, mini-bio.
- Thank you for all your work.