Hit the Ground Running:

A quick-start guide for new knowledge mobilizers

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About this Report

Welcome! As the first cohort of Knowledge Mobilization (KMb) Fellows at Bishop's University, we are so excited to share with you our experiences.

This fellowship was supervised by the Office of Research and Graduate Studies at Bishop's University in Sherbrooke, QC. This guidebook was co-authored by 2020-2021 Knowledge Mobilization fellows: Jessica Stacey, Mackenzie Gordon, Tanisha Campbell, Sonya Anvar, and Katy Celina Sandoval.

This report outlines the experiences of the five Fellows, as they worked individually with a Bishop's professor to brainstorm, plan, initiate, and evaluate a knowledge mobilization plan. The professors we worked with each had different levels of understanding surrounding knowledge mobilization, and each had very different goals for their research. This led to differing experiences for each of the five fellows. In the hopes that others can learn from and build off of our experiences, we have put together this guidebook.

Collaborators

This project was funded by The Conference Board of Canada through the Government of Canada's Future Skills Centre.

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Future Skills Centre is a partnership of Ryerson University, The Conference Board of Canada, and Blueprint.

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Meet the Fellows

Jessica Stacey
Sherbrooke, Quebec

> B.A. Education, Honours in Music, Minor in French from Bishop's University

> Bachelor of Education from Bishop's University

> Completed the Bishop's University Knowledge Mobilization Certificate in 2020

Working with Dr. Sunny M. C. Lau, Canada Research Chair Nominee (CRC), on her research in Plurilingual Education

in Jessica Stacey

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To teach is to knowledge mobilize! As a full time teacher, it goes without saying that my target audience are my students. In addition to my students, I aim to be able to approach parents and colleagues with new research. After completing **edx.org** course on Introduction to Family Engagement, I was inspired to share what I learned. The recent research on family engagement highlights the positive outcomes it can have for students, teachers and parents. I knew that I would need Knowledge Mobilization skills to help me reach my target audience.

Bishop's University's KMb certificate opened my eyes to the complexities of research and the research 'gold standard'. I loved learning about how science communication is used in all fields. Practicing my science communication skills in situations outside of the world of education was an informative challenge. After completing the certificate, I feel that I have a toolbox full of KMb resources, for example **researchimpact.ca**. I am confident that I will continue to use my KMb skills for the years to come.

Mackenzie Gordon
Ottawa, Ontario

> B.A. with Majors in Psychology & Sociology from Mount Allison University

> Certificate in Social Research Methodologies from Mount Allison University

> Completed the Bishop's University Knowledge Mobilization Certificate in 2020

Working with Dr. Heather Lawford, Canada Research Chair (CRC) in Youth Development, on her research in Youth Generativity

I am particularly interested in community-based research and education, critical social work and sociology, and community healthcare. As part of an internship, I worked on a communication project with the John Howard Society to develop a campaign to help change public perceptions on homelessness in Moncton that was based in theory and social research. This project peaked my interest into the knowledge mobilization world, and is one of the main reasons why I was interested in learning more about KMb and research communication strategies in general.

Going into social work, the knowledge mobilization program has helped me understand the ways that science and health communication will be important within this field, in communicating with clients, communities, organizations, and policy makers. Many associate KMb with STEM, though it is equally important in social sciences and humanities fields!

My favourite aspect of the **Bishop's KMb certificate** was the weekly guest speakers! The guest speakers provided students with a great idea of the many different KMb fields and job positions, as well as an idea of the skills required to get there!

Tanisha Campbell
Montreal, Quebec

> B.A. Psychology Specialization, Minor in First Peoples' Studies (2018)

> B.A. Modern Languages, Concentrations in International Japanese Studies and German

> Completed the Bishop's University Knowledge Mobilization Certificate in 2020

Working with Dr. Matthew Peros, Canada Research Chair (CRC) in Climate and Environmental Change

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During the COVID-19 pandemic, I sought to make extra use of my quarantine time and pursue a career change. Being the first in my family to graduate from university, I enrolled in the Bishop's University **KMb Graduate Certificate Program** and graduated in August 2020. The courses were extremely informative in explaining how communication skills and methodologies play a substantial role in bringing key information to the target stakeholders in the right format at the right time. My experience in applying such knowledge during my remote practicum gave me a taste of what a career in knowledge mobilization could feel like. Needless to say, I was hooked.

Using my new-found knowledge and honed communication skills, together with Dr. Peros, we developed a KMb plan to disseminate information about his projects, create a logo, and formulate in-house protocols for future use.

The notion that KMb can take any form and requires us to learn new skills regularly is an empowering feeling - I feel well equipped to take on any challenge and project.

Sonya Anvar
Sherbrooke, Quebec

> B.A. Biology - Health Sciences, Minor in Psychology

> KMb Strategist, *ANVAR Transfert de connaissances*

> Completed the Bishop's University Knowledge Mobilization Certificate in 2019

Working with Dr. Jason Rowe, Canada Research Chair in Exoplanet Astrophysics, on his research on exoplanet discovery and characterization

in **Sonya Anvar**

During my undergraduate studies, I was taught the scientific method. As a person with no previous science background, I wasn't aware of the complex analyses and rigorous techniques needed to uncover new information! This newly found interest guided my curiosity for science communication, which led me to the **KMb certificate**.

A particular notion struck me during my KMb studies: building research impact. The implementation of research results is not a automatic process; it takes people to ensure that knowledge is not only printed in scholarly journals, but is also adopted into evidence-based practices, policies and such. Building research impact is what we, knowledge mobilizers, are called upon to do. I feel fortunate to have the privilege of calling knowledge mobilization my job!

Katy Celina Sandoval
Hamilton, Ontario

> BSc in Neuropsychology, Minor in Biochemistry from Bishop's University

> MSc in Psychology from the University of Calgary

> PhD in Neuroscience at McMaster University (current)

> Completed the Bishop's University Knowledge Mobilization Certificate in 2020

Working with Dr. John Ruan, Canada Research Chair Nominee, to promote his research in Multimessengers Astrophysics

in **Katy Celina Sandoval**

As a graduate student, communication skills are incredibly valued. The ability to communicate studies in the field of neuroscience to different audiences is important. It is well known that science can feel out of reach to many people, making them feel like they don't have the intelligence to understand. Often, the main issue is the inability of scientists to communicate their work in ways that are easy to understand and tailored to a specific audience. I am inspired to promote that bridge as a science communicator.

What I loved the most about the **KMb certificate** program at Bishop's University was to discover all the amazing resources that exist to create interesting and relatable content for any topic. I also enjoyed learning how to apply KMb in my own research. My presentations have since improved.

Prepping For Your First Meeting

> **Conduct background research before your first meeting.** Gather all the information you can on the person/group you are working with, all previous research and work, and information on who they are currently partnered with.

> **Create a list of questions.** This should include all the things you want to cover during your first conversation: learn about their ongoing projects; identify specific questions regarding their work; remember to ask open-ended questions.

> **Understand your own strengths and limitations.** Personal reflection prior to your first meeting is important, as it allows you to make suggestions for your clients that will be manageable, within your time frame and expertise.

> **Create a list of possible ideas, tools, platforms, and materials.** As you are brainstorming with your client, this list allows you to make suggestions for possible activities and products that fit with your client's goals and interests.

> **Ask to record your first meeting.** A lot of information will be shared, and being able to fully listen without taking notes will help you focus on the conversation. You can refer back to the recording afterwards.

Astrophysics? I could not have less of a clue about the research subject I'm about to mobilize. Therefore, prior to our first meeting, I made sure to find a maximum of information on my CRC's background and his research projects. I used **this planning template** to help us establish a strategy. I also planned ahead regarding our workflow, and came up with different proposals of project management tools.

Sonya

I used a **KMb Needs Assessment Planner** to help create a conversation with my client about their experience with KMb and where I can be of most help. It was important that I guide them in making KMb decisions that I know I can support with my skills and with the KMb knowledge I have.

Jessica

Background Research

Before your first meeting, be sure to research your client as much as you can. Rather than reading all of their publications, read the abstracts and skim for key definitions and terms. From there, you will be able to generate specific questions and guide your first conversation. Places to look for background research on the topic:

- Google Scholar
- Research Gate
- Youtube
- Podcasts
- The Conversation Canada
- Affiliated Universities or Organizations

The more you know, the more confident you'll feel when your first meeting comes up. You'll have a prior understanding of their expertise and can begin brainstorming on stakeholders and end-users you might want to include in your KMb plan.

Prior to our first meeting, I came across an old website of his, which had not been updated in a while.

Sonya

Seeing that he had an interest in blogging gave me the idea for a website that could present his work. In preparation, I also read a few articles and watched videos about exoplanets and astrophysics in general, a subject which I knew very little about.

Prior to my first meeting with my CRC, I sent out an e-mail to e-introduce myself and used it as an opportunity to show initiative: I asked for a list of resources to better inform myself on the client's work and current projects. If I could go back to my first meeting, I would have provided more clarification on what my role as a knowledge mobilizer would be, however, this was clarified as we progressed with the projects.

Tanisha

Setting Expectations & Defining Roles

Before your first meeting, you should develop a really clear understanding of your role, your strengths, and what you can offer within the time constraints, and the scope of the project. Your client may have varying levels of understanding surrounding knowledge mobilization, and this is where you will need to provide information surrounding your role and bridging the gap.

Things to think about in planning your first meeting:

- What is my role?
- What am I capable of?
- What are the time constraints?
- How will I ensure the sustainability of this project?
- What other barriers could I face?

Developing Your KMb Plan

Where to start?

In order to develop your KMb plan you need to answer a few questions. These questions will help you address the KMb needs of your client and get on the same page. Below is a short summary of the questions that will need to be addressed. For even greater detail, check out this planning form, found at **researchimpact.ca** .

What? — What is it that you want to mobilize?

Why? — Why is it important to mobilize that knowledge?

Who? — Who are your partners? Who is your audience?

When? — When do you need to have it ready for? What is your timeline?

How? — How do you plan on mobilizing your knowledge? What resources do you need?

Impact — How will you determine that you achieved your goals?

Logic Model Template

Audience Who are you trying to reach? Is there a tailored message for this audience?	Strategy How will you get your message(s) across? What strategies will work best for this audience? Consider how each strategy links to your overall goal.	Target How many conferences and workshops do you want to deliver? How many users do you want to reach?	Budget and resources E.g. honoraria, information technology, materials, meeting expenses, personnel or human resources, timing, travel, volunteers, etc.	Timeline When do you anticipate executing your strategies?	Evaluation What impact are you trying to achieve? How will you know if you have achieved your goals?

Source: **KMb Toolkit**

Importance of Planning

Developing a proper KMb plan is one of the most important steps. This is where you identify all the key components of what you aim to accomplish and how you will achieve it. A solid plan will provide guidance in your process and serve as a reminder of what it is you are trying to accomplish. It will also be useful to inform your client of what to expect in a clear and concise way. The KMb plan can be used to prioritize certain activities and identify the ones that are realistic to accomplish with the resources and the timeline available.

> **Mackenzie** broke her logic model into key phases. These phases allowed her to clarify what activities had to be done, what the goals were for each stage, what supplies or support she would need, and a rough timeline of each stage.

> **Tanisha's** logic model enabled her to create a proposal for her client which made it easier to develop a more concise project design. The logic model allowed her to ask, "What does a successful project look like for you?" This provided her with a list of elements that need to be included in the project.

My logic model really helped me break down all of the amazing KMb activity brainstorming I did with my client. After that, the logic model helped me create a 'to do' list and get started on those tasks. A few weeks went by where I didn't need to refer to my logic model because I was working off my to-do list. As I got to the end of my to-do list, I went back to my logic model to check that I was still heading toward our goals and look for the next steps.

Jessica

I created the logic model after my third meeting with my client. This logic model was focused on the main components of the project that we had decided to focus on. It allowed me to develop a timeline and set soft deadlines for myself, in order to achieve what we had planned. While our plans changed over time, having the initial logic model was really beneficial in fostering clear communication between my client and I, as they were able to reflect on the plan and offer insights into what barriers I may run into.

Mackenzie

Product Development Process

Time Management and Deadlines

Once your logic model is established, you can work on building a timeline for each of the expected products and outcomes. The key in the development process is to break each product down into actionable steps and assign a deadline to each step. Re-assess your timeline on a regular basis, as of course, unexpected circumstances and changing needs will arise during the process. If you are managing certain aspects of a project for the first time, include learning time prior to beginning on that specific task. Remember to plan ahead, yet be flexible.

> **Tanisha** ensured to create actionable steps and labelled them as 'homework' either for herself or for the client. Consistent check-ins helped to keep the projects on track.

> **Jessica** quickly found herself with too many obligations and not enough time. After speaking with her client, they worked together to find a new project deadline.

> **Katy** realized that working remotely from home brought its own challenges. She set time limits to avoid spending too much time on one project and communicated them with her client. Katy only sheduled meetings if it was absolutely necessary, sometimes a quick message or phone call was enough.

Understanding the research project proved to be longer and more difficult than expected. Astrophysics is a complex field, and as the core of our KMb strategy was to build momentum around a micro-satellite launch, I had to understand the field in order to communicate the research in lay language. I put way more hours than expected into reading and learning! This being said, not being an expert turns out to be a good thing, as I can assess my work from the perspective of our intended end-users, who for most part, have very little knowledge regarding astrophysics.

Sonya

Katy

Assessing the needs of my CRC nominee was a little harder than anticipated and it felt like I was forgetting something that could provide some guidance. Looking back, I believe it's completely normal to feel this way as a first-time knowledge mobilizer. With time and communication, we were able to re-evaluate our timeline and KMb plan to ensure that we were focusing on the right activities and those that were realistically achievable with the time we had available. Once we established the priorities we were able to move forward and complete our goals and an additional one that we thought of in the process.
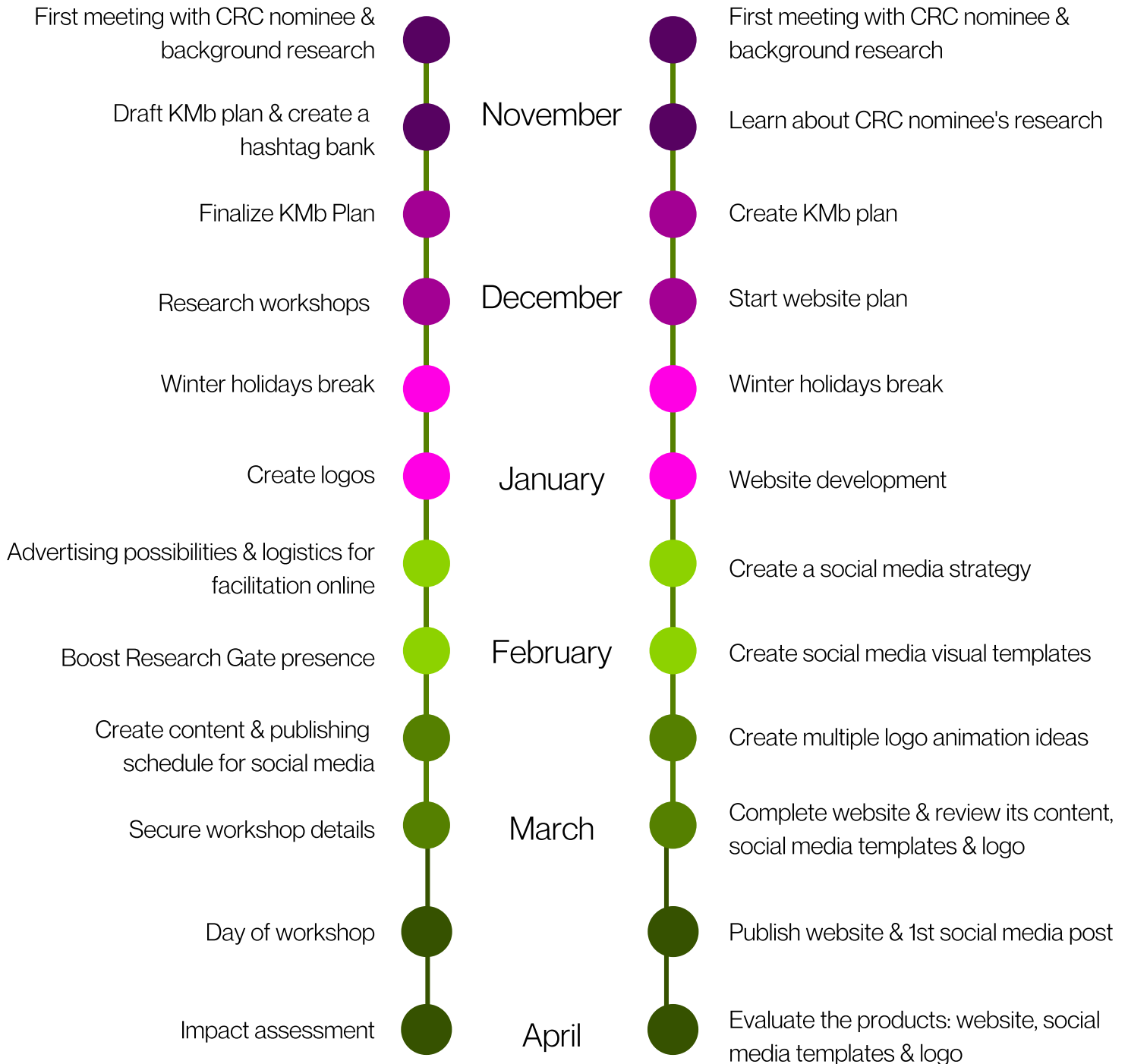
Product Development Timeline

Jessica **Katy**

Jessica	Month	Katy
First meeting with CRC nominee & background research		First meeting with CRC nominee & background research
Draft KMb plan & create a hashtag bank	November	Learn about CRC nominee's research
Finalize KMb Plan		Create KMb plan
Research workshops	December	Start website plan
Winter holidays break		Winter holidays break
Create logos	January	Website development
Advertising possibilities & logistics for facilitation online		Create a social media strategy
Boost Research Gate presence	February	Create social media visual templates
Create content & publishing schedule for social media		Create multiple logo animation ideas
Secure workshop details	March	Complete website & review its content, social media templates & logo
Day of workshop		Publish website & 1st social media post
Impact assessment	April	Evaluate the products: website, social media templates & logo

Working With Your Client

Skills

As a knowledge mobilizer, you bring key skills to every project. Each new project allows you to further expand on your skills and develop new skills.

> **Mackenzie** learnt many technical skills around developing a website - specifically, what is helpful to include, how to ensure it is accessible for all to read while managing the creative ideas that came up. She also had to choose a domain, work with search engine optimizations, colour palettes, widgets and apps, etc.

> **Jessica** found that certain skills were essential in the product development phase,. It was helpful to be organized, self-motivated and willing to try something new.

The aspect that took the longest to complete was definitely developing my KMb product. This is the phase that requires a lot of mutual decision-making, which takes time to happen organically. I often reminded myself to go with the flow! Things will change, and that's usually how really strong products are developed, as people make edits, changes, and reflect on overall goals and methods of achieving those goals.

Mackenzie

Your Client and Their Team

Working with your client may also mean having frequent contact with members of their team for example, co-researchers, lab workers or committee and group members. Their participation in your KMb work may vary but they can be a resource for your work.

> **Sonya** worked with a team that included the resarch project manager, one of her CRC's students and a graphic designer / UX specialist. The team was setup quite late, but having a team to collaborate on the website made the content creation process way easier.

> **Mackenzie** was able to be present during her CRC's research lab meetings. She benefitted from hearing the students' perspectives on her ideas and collaborating with them.

My CRC has a very busy schedule. The most difficult part of the product development has been finding a common time for us to meet. It was important to keep my client updated on the progress of the website development while not taking up too much of his valuable time. Finding the right workflow for both of us was not as easy as I expected. In the end, don't hesitate to ask your client if he or she can put you in contact with a student or lab member whom you can also check-in with.

Sonya

Finalizing Your Product

Making Adjustments

Developing your products may be a long process, but often a majority of the time will be spent making changes and alterations to your product with your client and again after your impact assessment. Throughout this process, reflect on the following components:

- Was the intended audience considered?
- Have the needs of your client been met?
- Is the product accessible?
- How will the product be shared?

Dotting Your I's and Crossing Your T's

As you near the final phase of your product, it is a good idea to review if all your client's needs are met based on your KMb plan and the tweaks and changes that came up along the way. A good way to keep track is to create a tick-sheet or list and, before giving the final stamp of approval, be sure to send the product over to be reviewed by the client. The true final step is to assess the effectiveness of the product. That can range from a verbal review from your end-users to a survey sent out with incentive (i.e. prize draw) to participants.

During the finalizing phase I needed to use collaboration skills. A few times, I had done some work that someone else on the team had already done – coming from a perspective where I am used to working on my own, learning to collaborate efficiently is one of the skills I definitely feel will help me moving forward in my career!

Sonya

At times, we can be our worst critic. As we reflect and review our products and deliverables, we tend to focus on the flaws or little things that we would love to go back and change. I think that as we commit to disseminating information through KMb, working closely with clients and learning from previous errors, we will begin to feel more confident in our work and find ways to build more polished products and deliverables that better reflect our ever-evolving skill sets and abilities.

Tanisha

Evaluation & Impact Assessment

Your Strategy and Its Intended Goals

What are the desired outcomes of your KMb strategy? Your assessment should be consistent with your theory of change. When planning a strategy with your client, be sure to have a clear idea of what you wish to evaluate, and how (the more specific, the better). Clear goals will help ensure that the collected data will serve a specific purpose and be readily usable by your client to further their mobilization efforts. If the intended evaluation goals are not clear, chances are that the collected data will not be helpful.

> **Tanisha** used two methods to evaluate her final product. Using quantitative data (such as a Likert scale) can be helpful, but collecting qualitative data helps to explain your quantitative findings.

> **Mackenzie** found the table below helpful, found in **this evaluation tool**.

Evaluation level	What questions are addressed?	How will the information be gathered?	What is measured or assessed?	How will the information be used?
1. Participants' reactions	• Did they like it? • Was their time well spent? • Did the material make sense? • Will it be useful? • Was the leader knowledgeable and helpful? • Were the refreshments fresh and tasty? • Was the room the right temperature? • Were the chairs comfortable?	• Questionnaires administered at the end of the session • Focus groups • Interviews • Personal learning logs	• Initial satisfaction with the experience	• To improve program design and delivery

I used the SMART Method to evaluate the knowledge acquired by our end-users when browsing the website.

Sonya

SMART means to evaluate Specific, Measurable, Achievable, Relevant and Time-Bound learning outcomes. We wanted to evaluate the educational outcomes of our website by adding a quick question at the bottom of each page to assess knowledge gain.

I plan to do a survey at the end of the workshop so I will have data on usefulness indicators and reach indicators (see the **Ghent Toolkit** for more

Jessica

detail). However, for smaller things such as working on my client's Social Media presence, I relied on her feedback to know if I was successful or not. When I designed logos, I designed many options and the TESOL Without Borders group chose their favourite.

Final Thoughts

If you could give yourself one piece of advice...

Jessica

You don't know if you don't ask, so don't wait to ask a question!

Mackenzie

Be ready and willing to adapt!

Tanisha

Use this opportunity to develop new skills!

Sonya

Don't be afraid of your leadership!

Katy

Trust your skills, be confident in what you can do!

Acknowledgments

A Special Thank You

This report would not have been possible without the support and feedback from the following individuals:

- Raphaëlle Mercier Gauthier, Bishop's University
- Dr. Suzanne Hood, Bishop's University
- Dr. Sunny Man Chu Lau, CRC Nominee
- Dr. Heather Lawford, CRC in Youth Development
- Julia Levin, Research Impact Canada
- Dr. Matthew Peros, CRC in Climate and Environmental Change
- Dr. Jason Rowe, CRC in Exoplanet Astrophysics
- Dr. John Ruan, CRC Nominee