Knowledge translation guide: Practical tips and experiences

A summary of
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Categories:

Method, Implement, Evaluate, Communication, Knowledge brokering, Knowledge exchange, Knowledge management, KT theories, Policy brief, Program planning, Situational assessment, Stakeholder analysis and engagement

Method

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Relevance For Public Health

This comprehensive resource will help decision-makers and researchers working in public health to share information and build collaborative relationships to foster learning. For instance, this toolkit can assist with all phases of an initiative, from engaging decision-makers and researchers in the policy-making process, to mapping contextual factors through stakeholder analysis and writing policy briefs and other approaches to effect change.

Description

The aim of this resource is to help decision-makers and researchers reduce the 'know-do' gap by applying research and evidence to policy and practice. Developed by Canada's International Development Research Centre (IRDC) and the Swiss Agency for Development and Cooperation (SDC), the *Research Matters KT Toolkit* is a useful and comprehensive resource with practical ideas, tips and experiences from contributors who have used evidence in their work. The *Research Matters KT Toolkit* includes 12 chapters:

Chapter 1: Knowledge Translation: An Introduction
Chapter 2: Bringing in the Demand: Towards the Harmony of Push and Pull
Chapter 3: Knowledge Management
Chapter 4: Context Mapping
Chapter 5: Evaluative Thinking
Chapter 6: Designing a Communications Strategy
Chapter 7: Communicating Research: Print Media
Chapter 8: The Two-Pager: Writing a Policy Brief
Chapter 9: Systematic Reviews
Chapter 10: Open Access
Chapter 11: The Conference 2.0: Better Presentations, Better Conferences
Chapter 12: Tapping Technology: Integrating Application

Implementing the Tool

Who is Involved?

Many individuals and organizations could be involved in using different components of this method, depending on the stage and scope of the initiative.

Steps for Using Tool

The *Research Matters KT Toolkit* has 12 chapters. These chapters can be downloaded individually.

Chapter 1: Knowledge Translation: An Introduction

- Knowledge translation (KT) includes many terms and definitions. KT works to connect research and action through relationships.
- Since there is no concrete formula for decision making, KT relies on relationships to connect decision-makers and researchers. These groups can be connected through partnerships, collaborations and personal contact.
- There are four key models of KT (push, pull, exchange and integrated), as discussed by Lavis et al., 2006. The toolkit discusses all the key models, but it focusses on the 'push' side of KT.
- This guide uses three core KT principles:

1. *Knowledge*: KT initiatives need a solid, accessible and contextualized knowledge base.
2. *Dialogue:* KT is based on relationships that are sustained through regular dialogue and exchange.
3. *Capacity*: Decision-makers, researchers and others need capacity to engage in KT.

Chapter 2: Bringing in the Demand: Towards the Harmony of Push and Pull

- This chapter explores the policy process and the nature of evidence, and mechanisms for linking these together.
- KT aims to increase understanding of decision making and research processes through relationship building and personal contact.
- There are three levels of the policy process with different types of policies at each level: legislative, administrative and clinical.
- Lomas et al. (2005) identified 3 different types of evidence: context-free, context-sensitive and colloquial.
- Different stakeholders have different notions/thoughts about evidence and assign different weights to each piece. Research/**scientific** evidence is only one piece in the policy pie. Evidence depends on context defined by the user(s).
- Research and policy can be integrated through linkage and exchange.
- Some ***linkage and exchange strategies*** include priority-setting exercises (to determine what is researched), funding, collaborative research projects, knowledge systems and dissemination of research findings.
- Use a ***knowledge broker*** to connect decision-makers and researchers.
- A knowledge broker's roles include synthesizing research, creating partnerships, assisting in accessing evidence, facilitating dialogue, priority-setting, conducting collaborative research, using KT strategies, and finding funding opportunities.
- ***Knowledge Translation Platforms (KTP)*** are institutions or organizations that do knowledge brokering and foster linkage and exchange. KTPs mediate between research and policy.
- Key activities of Knowledge Translation Platforms are synthesizing research and creating a rapid response unit to provide research evidence quickly to decision-makers.
- Knowledge Translation Platforms may also use ***deliberative dialogues*** to foster discussion on an issue and identify priorities for action. Deliberative dialogues provide contextualized information to support decision making. Deliberative dialogues may identify areas for strengthening capacity.

Chapter 3: Knowledge Management

- Knowledge management (KM) is about creating, identifying, capturing and sharing knowledge. "It is about getting the right knowledge, in the right place, at the right time, particularly in influencing an action or decision."
- This chapter discusses how to develop a KM strategy and provides tools to support organizations in managing knowledge.
- There are two types of knowledge: tacit and explicit. ***Explicit knowledge*** is tangible and can be captured and recorded. ***Tacit knowledge*** resides within people, is context-specific and includes insights, intuitions and experiences. Tacit knowledge is more difficult to document since it requires time and personal interaction.

A ***Knowledge Management strategy*** asks these questions (Denning):

1. What knowledge do we want to share (type and quality)?
2. With whom do we want to share it (audience)?
3. How will our knowledge actually be shared (channels)?
4. Why will this knowledge be shared (motivations and objectives)?

A successful KM strategy requires organizations to change how they are creating, capturing, sharing and using information. It is built on people, processes and technology. Several tools can be used for a KM strategy. The following steps are outlined for each tool:

1. ***Knowledge audit*** is an inventory that assesses and lists an organization's knowledge resources, assets and flows.
2. ***Knowledge harvesting*** aims to capture an individual's decision-making processes so that another person could use the same process and achieve the same results.
3. ***The After Action Review*** assesses a past event, project or process by bringing teams together to learn from their experiences. The group discusses strengths and weaknesses, and provides feedback and insight to improve performance.
4. ***Best practice*** describes a useful case study and a process that has been successful in a particular context. Sharing best practices involves sharing both explicit and tacit knowledge. For more information, see a resource in the Registry on Sharing best practices internally.
5. ***Storytelling*** is an important tool to share tacit knowledge within organizations, build community and support change and innovation.
6. ***Communities of Practice*** allow groups of practitioners with a common interest to share their experiences. CoPs are fluid, flexible and informal with membership and its objectives since they are not bound to a project or timeline.
7. ***Peer assist*** is a meeting where a group of peers come together to discuss a problem, typically before a project starts, to draw on the experiences of others who have dealt with similar issues in the past.

Chapter 4: Context Mapping

- Context mapping, stakeholder analysis and policy network mapping all seek to understand the setting and all potential actors and stakeholders that surround a public health issue.
- Context mapping is the process of understanding and adaptation. Understanding the context is key to knowing who and what to influence through research and policy making.
- Context mapping asks these questions:

1. What are we trying to achieve?
2. Who is our target audience? This involves desegregating and prioritizing the audience into those who are better positioned to act on our recommendations.
3. Who are the important actors within our target group?
4. What level are we trying to influence?
5. How politicized is the issue?
6. What are the information needs of our target audiences?

- These are some common context mapping tools, with steps given for each technique:

Stakeholder analysis collects and organizes qualitative data on the interests, behaviour, intentions and influence of different actors in relation to a particular issue. This tool is useful for identifying whose support is needed for a project. Steps include:

- Creating a stakeholder table
- Assessing each stakeholder's importance and influence
- Identifying risks and assumptions

Force-field analysis seeks to identify the pressures for and against a proposed change in policy or program. This tool uses data from interviews, literature reviews and stakeholder workshops, and can be used to determine if a project is feasible. Steps include:

- Placing the project/idea in the middle of a page
- Listing the forces for and against the change
- Assigning a score for each force (1=weak, 5=strong)

Influence mapping is also known as stakeholder influence mapping, power mapping or arena of influence. This tool seeks to identify stakeholders with power to influence key decisions and how to communicate with them. This approach is useful to distinguish between decision-makers and those who can influence them (e.g., opinion leaders).

Policy network mapping can be used to map relationships between individuals and key decision-makers with political influence.

The ***Policy Cycle and Policy-Making Theories*** uses stages to create an understanding of the influences on policy development. These stages include: agenda-setting, identification of policy alternatives, policy formulation, policy implementation and evaluation.

Chapter 5: Evaluative Thinking

- Evaluative thinking (ET) is an ongoing process of questioning, reflecting, learning and modifying. It identifies what we are learning and how we can use lessons learned to improve our performance. ET is

learning for change.
- ET, like Patton's (2006) developmental evaluation, aims to create context-specific knowledge to shape our work.
- ET:

1. creates 'feedback loops' that inform and change our current direction;
2. allows goals to evolve and emerge;
3. infuses the spirit of evaluation—reflection, learning, change—in everything we do.

Learning organizations embrace ET by generating lessons and then using those lessons to modify core operations. They create learning opportunities on a continuous basis for all staff. The five key activities of learning organizations are:

- systematic problem solving;
- experimentation with new approaches;
- learning from its own experiences and past history;
- learning from the experiences and best practices of others; and
- transferring knowledge quickly and efficiently throughout the organization.

Evaluative thinking tools include the following (with steps provided):

- ***Most Significant Change*** asks stakeholders to reflect upon the strongest aspects of change or impact and the reasons why the event was important.
- ***Appreciative Inquiry*** uses storytelling to capture and share information on the key information of a project at its best. Appreciative inquiry is broken down into five stages (definition, discovery, dream, design and destiny).
- ***After Action Review*** (see Chapter 3 on KM Strategy)
- ***Horizontal Evaluation*** involves colleagues contributing toward a self-assessment as experts and peers who are familiar with the context.
- ***Impact Logs*** is an informal record of impacts that a project or organization has had.
- ***Formal Surveys*** are a useful tool for collecting data when information is needed from a large group of people.
- ***Rapid Appraisal Methods*** are quick, simple, low-cost ways of gathering information that can be used as lessons learned.
- ***Performance Indicators*** measure quantitative performance and can be used to assess progress toward predetermined benchmarks. They can be framed using SMART criteria (Specific, Measurable, Achievable, Realistic, Time-bound).

An ET strategy that incorporates these ET tools can be designed to meet the learning needs of the organization. The chapter discusses four ET strategies to institutionalize ET in an organization:

- **The Self-Assessment Survey** (such as Bruner Foundation's ET Self-Assessment Tool)
- **Progress Review** by a consultant to help an organization understand its learning environment and find vital lessons to modify existing practices
- **Supportive ET Environment** such as through organizational support, capacity building and technology
- **Budget** with respect to resources for ET (time, money, human resources)

Annex: Monitoring and Evaluation (Frequently Asked Questions) (p. 19-33)

Chapter 6: Designing a Communications Strategy

This chapter provides information on the *Essential Elements*, a series of 10 steps for developing a communications strategy:

1. **Review**: How have we been communicating in the past? How effective has that been? How do our audiences perceive us?
2. **Objective:** What do we want our communications to achieve? Are our objectives SMART?
3. **Audience:** Who is our audience? Do we have a primary and secondary audience? What information do they need to act upon our message?
4. **Message:** What is our message? Do we have one message for multiple audiences or multiple messages for multiple audiences?
5. **Basket:** What kinds of communications 'products' best capture and deliver our message?
6. **Channels:** What channels will we use to promote and disseminate our products?
7. **Resources:** What kind of budget do we have for this? What communications skills and hardware do we have?
8. **Timing:** What is our timeline? Would a staged strategy be the most appropriate? What special events or opportunities might arise?

9. **Brand:** Do all of our products use the same branding? How can we ensure that we are broadcasting the right message?

Chapter 7: Communicating Research: Using Print Media

This chapter provides useful tips for selecting the right print tools for your project, message and audience. It also outlines how to make the best use of these print tools and the steps involved in writing them, including additional resources for each tool.

1. **Articles in scientific journals**
2. **Newspaper articles and editorials**
3. **Press releases**
4. **Policy briefs**
5. **Newsletters**
6. **Brochures/leaflets**
7. **Cartoons**

Chapter 8: The Two-Pager: Writing a Policy Brief

This chapter focuses on practical tips and tools for writing a policy brief. The policy brief aims to give a clear and concise overview of the problem, a discussion of the evidence that could remedy the issue and suggestions for policy implementation. The policy brief clearly articulates the problem, possibilities for addressing the problem and policies or recommmended actions as the resolution. This section works through writing a policy brief as an exercise.

Chapter 9: Systematic Reviews

This chapter outlines the basic components of systematic reviews and provides examples of resources where you can access them.

Frequently asked questions about systematic reviews include:

- What is a systematic review?
- What is critical appraisal?
- What are the advantages of a systematic review?
- What is the methodology behind a systematic review?
- Where can I find systematic reviews?
- How can I learn how to do a systematic review?
- What is the future for systematic reviews?

Chapter 10: Open Access
This chapter focuses on ways to increase the visibility, audience and influence of peer-reviewed journals where knowledge is easily accessible.

Chapter 11: The Conference 2.0: Better Presentations, Better Conferences
This chapter focuses on the dynamic learning environment with a focus on how to improve oral, poster and conference presentations.

Chapter 12: Tapping Technology: Integrating Applications
This chapter provides information on how to get the most out of your computer applications (creating an electronic distribution list), the Internet (social networking, creating a blog) and desktop publishing.

Evaluation and Measurement Characteristics

Evaluation

Has not been evaluated

Validity

Not applicable

Reliability

Not applicable

Methodological Rating

Not applicable

Tool Development

Developers

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Method of Development

The *Research Matters KT Toolkit* was developed by Research Matters (RM), a collaboration of the International Development Research Centre (IDRC) and the Swiss Agency for Development and Cooperation (SDC).

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2008

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Resources

Title of Primary Resource	The Research Matters KT Toolkit: A Resource for Researchers
File Attachment	None
Web-link	http://www.idrc.ca/EN/Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=851
Reference	International Development Research Centre (2008). *The Research Matters KT Toolkit*. International Development Research Centre: Ottawa, ON. Retrieved from: http://www.idrc.ca/EN/Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=851
Type of Material	Online handbook
Format	On-line Access
Cost to Access	None.
Language	English, French
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