

Effective Knowledge Transfer & Exchange For Nonprofit Organizations

A FRAMEWORK



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We would like to hear from you.

Please send your comments about this guide to fzarinpoush@imaginecanada.ca.

Thank you.

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Introduction

In many countries we are witnessing the transformation from the industrial age to the information age and an increasing reliance on knowledge as a key resource for businesses and nonprofit organizations. This has led to increasing interest in understanding the mechanisms and processes that facilitate the transfer of knowledge among people or organizations. Indeed, a recent study conducted by the Working Knowledge Research Centre at Boston College (Jacobson and Prusak, 2006) shows that employees of various organizations spent less than 17% of their time searching and organizing information and more than 80% of their time eliciting, interpreting and applying it. The authors of this study observe that “*future payoffs will depend less on enhancing systems that track down information than on devising strategies to help employees use what they’ve found.*” (p.34)

The Purpose of this Report. This report provides a framework that is intended to help nonprofit organizations plan, conduct, and evaluate efforts to transfer and exchange knowledge with others. We hope that this framework will promote a more systematic approach to knowledge transfer and exchange among nonprofit organizations and encourage the consideration of a variety of approaches that can be employed. We also hope to increase attention to the importance of measuring the effectiveness of knowledge transfer and exchange activities.

The Importance of Effective Knowledge Transfer and Exchange. The effective transfer and exchange of knowledge is a crucial capacity for nonprofit organizations. It can provide the foundation for any activity that attempts to influence practices, policies or behaviours including:

- Delivering programs and services to clients and members
- Making the case for support to funders and donors
- Engaging in collaborative efforts with other organizations.

Defining Knowledge Transfer and Knowledge Exchange. Knowledge transfer and exchange issues have captured the attention of a variety of academic disciplines such as health, management, education, marketing, and applied social research. As a result, work in this area employs a variety of terms and concepts such as dissemination, knowledge diffusion, knowledge brokering, knowledge utilization, knowledge transfer, knowledge exchange and knowledge management that are often used interchangeably. For the purpose of this framework, we use the term *knowledge transfer and exchange*, which is defined as *a set of activities and approaches that are undertaken to move knowledge among those who have interests or needs in it.* This movement may involve primarily a one-way flow of knowledge from researchers to practitioners (i.e., knowledge transfer), or can involve the two-way movement of knowledge among researchers and practitioners recognizing that knowledge creation is not the sole domain of any one actor in a system.

The Organization of This Work. Our framework is organized into three parts. Part I provides background information and an overview of recent studies and initiatives in the field of knowledge transfer and exchange. It explains the key elements that should be defined when

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planning for knowledge transfer and exchange activities and points to the enablers and impacts of knowledge transfer and exchange that have been identified in the literature.

In Part II, we outline basic steps that nonprofit organizations can take to plan and evaluate knowledge transfer and exchange activities that are common in the nonprofit sector. We also provide some suggestions for evaluating knowledge transfer and exchange activities. Finally, Part III presents 10 examples of evaluation tools that can facilitate the assessment of knowledge transfer and exchange activities. Most of these tools were developed for and used in other activities and have been modified for this framework.

Part I: An Overview of Knowledge Transfer and Exchange

Before undertaking a knowledge transfer and exchange activity it is useful to consider the various elements that are involved and the potential outcomes that one wants to achieve. It is also worthwhile to consider some of the enabling factors that can further support and facilitate the planning and delivery of effective knowledge transfer and exchange.

Key Elements of Knowledge Transfer & Exchange

Recent literature points to five key elements to consider when planning a knowledge transfer and exchange activity (e.g., Levis et al. 2003; Gowdy, 2006; Carpenter et al, 2005, Zarinpoush & Gotlib Conn 2006). Each of these is described below.

Audience

It is important to define the target audience for knowledge transfer and exchange efforts. The more defined a target audience, the easier it is to address the specific problems they face and the greater the potential for the uptake of information (Williams Group, 2003).

When determining the target audience, Lavis et al. (2003a) suggest that it is important to consider who is able to act on the information, as well as who can influence those who can act. For research knowledge, for example, it is important to choose a target audience that will be able to make practical use of the research findings, either by implementing the findings themselves or by influencing others to act on the recommendations (Canadian Institute for Health Information, CIHI, 2001).

Canadian Population Health Initiative of Canadian Institute for Health Information (CIHI, 2001) conducted an environmental scan of knowledge transfer strategies of 17 government and non-government Canadian organizations that are involved in health or social research/policy. This study identified the following groups as target audiences for the participated organizations:

- community organizations
- government departments
- media
- business groups
- the public
- policy think tanks
- international organizations
- regional health boards
- professional organizations
- alumni
- universities
- clinicians, employees and other professionals

Tailoring the knowledge transfer and exchange strategy to the audience's needs, knowledge, and the sorts of practices they face on a daily basis is critical in an effective knowledge transfer and exchange activity. To be effective, it is important to communicate with your audience and listen to them. For example, Imagine Canada (formerly Canadian Centre for Philanthropy) conducted a series of consultations with representatives of nonprofit organizations to obtain their input about their information needs, preferences and abilities and how these should be met when disseminating knowledge (Hall, 1998). The results, then, were used to develop a dissemination strategy for of the National Survey of Giving, Volunteering and Participating (NSGVP, 1997).

Message

How research or any type of findings are packaged and presented can impact how readily the knowledge is to put into practice. It is sometimes useful, for example, to move away from more 'academic' presentations of the research findings (e.g. graphs and charts) and to use, instead, stories or anecdotes to convey the information (CHSRF 2005). As the Williams Group (2003) suggests, stories give life to the information they illustrate and people will pass memorable stories on to others, thereby circulating the information to a larger audience.

In constructing any message, it is important to focus on the 5Cs (Abernathy et al. 2001):

- **Clear:** a message is easy to understand,
- **Concise:** a message is easy to read,
- **Consistent:** a message is related to information that is consistent with other existing information,
- **Compelling:** a message offers something that commands attention, and
- **Continuous:** a message has follow-up to make sure it is not forgotten or overlooked.

It has also been suggested that "to make the most out of research evidence and to reach policy makers, give them something in a paragraph to get their attention; better still if you can give one sentence that can be a slogan, a mantra they can repeat.." ¹ (Report of Seventh Annual Invitational Workshop, CHSRF, 2005, p. 8). The language of the message is also important. For example, to influence decision makers, the research information should be in the form of "ideas" not "data." (Lavis et al., 2003a).

When preparing a message to transfer, it is also necessary to consider what information will be most useful to the audience. Effective messages show the audience the practical applications of the knowledge – why the information matters to them (Williams Group 2003).

Information that is drawn from a body of knowledge, rather than from a single study, can better enhance both the applicability and validity of the knowledge (Lavis et al., 2003a). The results of single studies are less likely to generate a robust conclusion. They could also be too specific to be applicable to other contexts, populations, and conditions. Therefore, it is suggested that systematic reviews should be applied to identify standards for information selection and packaging (Report of Seventh Annual Invitational Workshop, CHSRF, 2005).

Method

The choice of method for transferring and exchanging knowledge will depend on the audience and the message (CIHI, 2001). However, it is also worth noting, that knowledge is

¹ Cited by Dr. Kevin Keough, president and CEO of the Alberta Heritage Foundation for Medical Research

most effectively exchanged when using multiple methods, (Lavis et al., 2003a; Gowdy, 2006; Norman & Huerta 2006). In the dissemination strategy of results of the 1997 National Survey of Giving, Volunteering and Participating (Hall 1998), various materials were planned and developed. For example, fact sheets were available to provide quick overviews of information, themed reports prepared to give in-depth integrative treatment of some topics, training materials were available to present how to apply the research information, and workshop kits were used for presentations.

In many studies, knowledge exchange is preferable to knowledge transfer since a two-way flow of information can lead to an ongoing dialogue between knowledge producers and users and create learning opportunities for both groups. For example, Norman and Huerta (2006) suggest that setting up communities of practice – groups of people with common interests who interact regularly to share knowledge – is one interactive delivery method that effectively initiates and sustains collaboration among a diverse group of individuals.

Messenger

The messenger is the person, group, or organization that delivers the information to the audience. In order to enhance the transfer of knowledge, it is important that the messenger be seen as a credible expert on the information being presented. The report “Knowledge transfer: Looking beyond health” (Abernathy et al., 2000) suggests that audiences respond to familiarity and are more receptive if the information is presented by someone who is seen to be in a similar position to their own (for example, a colleague or someone they know from the community). The World Bank (2005) suggests that messengers should possess a number of key behavioural competencies, such as listening, patience, humility, and flexibility in order to gain the trust and respect of the audience and better interact with them.

Evaluation

Evaluation explains the effects that are expected as a result of transferring or exchanging knowledge. The effects could be on the recipients or the environment to which the knowledge is related.

It is important that the measurement materials and tools fit well with both the audience and the objectives of an activity. Performance measures can be designed to: capture a process associated with the pursuit of an impact (e.g. delivering a series of workshops); capture intermediate outcomes, such as changes in awareness, knowledge, or attitudes; or describe long term outcomes, such as tangible impacts on decision-making (Lavis et al., 2003b).

Impact of Knowledge Transfer and Exchange

Effective knowledge transfer and exchange efforts treat knowledge as a means to improve practice and situations by having positive impacts, rather than as an end in itself (Williams Group 2003). Given that the overall goal of knowledge transfer and exchange is to reduce the gap between knowledge and practice, the following are some desirable changes that have been discussed in some studies and could be observed when moving towards this goal. They include: increased user’s capacities to apply knowledge, integrating knowledge into the decision-making process, prompting a cultural shift within an organization or a community of practice, and increased collaboration among knowledge producers and users.

Increased capacity to use knowledge

In an international study, the World Bank (2005) explains capacity as the ability to use knowledge to make sound decisions and effectively solve problems. This study is aimed at enhancing this capacity through conducting effective knowledge transfer.

Improving capacity for knowledge uptake requires creating a greater appreciation for knowledge and the contributions that it can make if put into practice (Hennink & Stephenson, 2005). It is about empowering participants to apply the gained knowledge to real-life situations and problems in their own local contexts. Thus knowledge transfer and exchange activities that focus on the application of knowledge (rather than merely the provision of knowledge) can lead to an increase in the capacity of users to interpret and apply what they have learned.

Integrating evidence into decision-making

In many knowledge transfer and exchange efforts, a desirable impact is to influence decision-making processes and make it evidence-based (CHSRF, 2005). The knowledge that is produced and exchanged should help users make well informed decisions about the various policies, programs, and projects in which they are involved. This impact is, in fact, a logical consequence of knowledge transfer and exchange. If the information is about the facts that are surrounding issues on which decisions are being made, it should provide various options and perspectives and reveal potential solutions or challenges (Pyra, 2003).

Cultural Shift

The cultural differences between researchers and practitioners are pointed as a major issue that significantly affects knowledge exchange (e.g., Lomas, 2000; Forthergill, 2000). It is desirable to foster a culture that encourages an ongoing dialogue between knowledge producers and users which can produce an environment whereby both groups will better understand each other's perspectives, experiences, languages and needs (CHSRF 2005).

Collaboration

Collaboration is a means and an end to knowledge development, transfer and exchange. Knowledge transfer and exchange happens in the context of relationships (Norman & Huerta 2006). Measuring the level of collaboration created through knowledge transfer and exchange is important. Activities that support collaboration among researchers and practitioners can promote the creation of knowledge that is current, relevant, and readily applied by users (CHSRF, 2005). A collaborative environment also embraces the continuity of knowledge exchange among those involved and results in stronger links among groups necessary for knowledge transfer (CHSRF, 2005).

Enablers for Knowledge Transfer and Exchange

What are the factors that enable knowledge transfer and exchange in an organization? Besides the five key elements of effective knowledge transfer and exchange that should be considered in planning, what can facilitate the process of our work? These can include such things as, having funders establish supportive practices and policies, creating a positive organizational culture in which knowledge is used, establishing partnerships between knowledge producers and users, and having ongoing dialogue among parties interested in knowledge.

Funding agencies

Funding agencies can play an important part in enabling knowledge transfer and exchange. A well-defined role of these agencies suggested as an enabler and encouragement, particularly, to disseminate knowledge (Hennink & Stephenson, 2005). They can include end users in the funding review process to ensure the relevance of the research. They can also facilitate ongoing relationships between researchers and end users. Additionally, funding agencies can create incentives for researchers to engage in knowledge transfer and exchange or train them to better communicate their findings. Finally, funders can assist users in locating and accessing the information they need (Pyra, 2003).

Organizational Culture

In order to foster knowledge transfer and exchange, it is important to have an organizational culture that is open to change and promotes sharing and learning. As Syed-Ikhsan and Rowland (2004) state, knowledge grows when it is used and depreciates when it is not. It is therefore important for organizations to encourage cooperation, collaboration, and knowledge sharing. It is also important for organizations to be openly committed to finding and using high quality evidence and to developing the skills and tools needed to interpret the knowledge and put it into practice (CHSRF, 2005).

Partnership in the Knowledge Development Process

Partnership between researchers and practitioners or decision-makers allows opportunities for all parties to better understand each other's perspectives and needs. One way to encourage it is to involve the end users early in the research process (Pyra, 2003). Early involvement could be in the form of joint projects (CHSRF, 2002). It gives practitioners a sense of ownership of the research and its findings (Hennink & Stephenson, 2005). By being involved throughout the research process, practitioners have an enhanced understanding and uptake of the information and are able to incorporate it readily into their activities.

Ongoing Dialogue

Fostering an ongoing knowledge exchange dialogue between knowledge producers and users is another way to produce an atmosphere in which both groups will better understand each other's perspectives, experiences, and needs. This dialogue, for example, can help policy makers ask questions that are answerable by research and obtain latest skills and tools they need to integrate knowledge into their practices (CHSRF, 2005). It can also improve researchers' work and solve their problems. Lavis et al. (2003a) refers to research studies that demonstrate interaction between researchers and their audience and how it can help researchers understand why some types of research knowledge are used and some are not.

Part II: Knowledge Transfer and Exchange Activities

In this section, we consider what learned from the literature and provide information to facilitate the planning and evaluation of knowledge transfer and exchange activities. For each activity, we first explain it and offer a definition. Then, we outline some tips and questions that can help nonprofit organizations to incorporate the key elements of effective knowledge transfer and exchange in their planning process. Four of the five key elements of knowledge transfer and exchange (i.e., audience, message, delivery method, and evaluation) are explained for all activities but the tips for identifying a “messenger” are included only when this element plays a crucial role in the activities. Although in practice, these elements are interrelated (see Figure 1), a separate focus on each allows us to better describe the role that each can play in knowledge transfer and exchange and how to integrate that element into planning.

This part of our framework is completed by introducing the knowledge transfer and exchange spectrum (Figure 2). This spectrum shows that although the activities of knowledge transfer and exchange are connected, they are different. While some activities focus more on transferring knowledge, other activities are about exchanging knowledge. The spectrum also highlights, in a comparative way, two significant aspects of these activities:

1. the level of outreach that each activity can create , and
2. the level of interaction between knowledge producers/senders and knowledge users/receivers that should be expected when conducting each activity.

Figure 1: Steps for Planning an Effective Knowledge Transfer/Exchange (KT/KE)

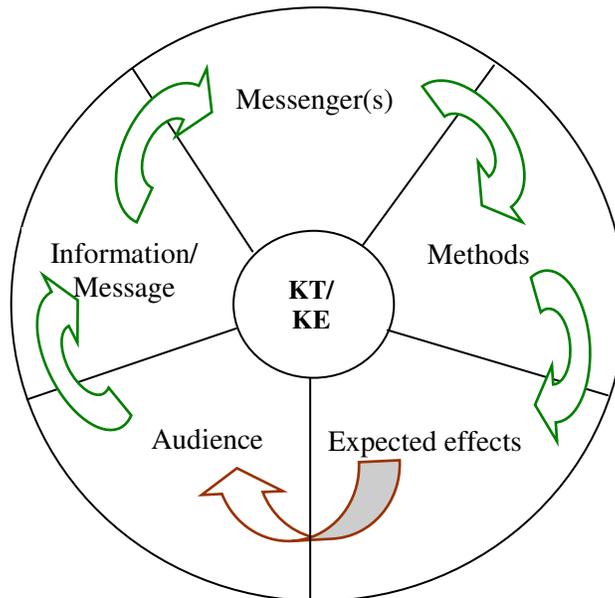
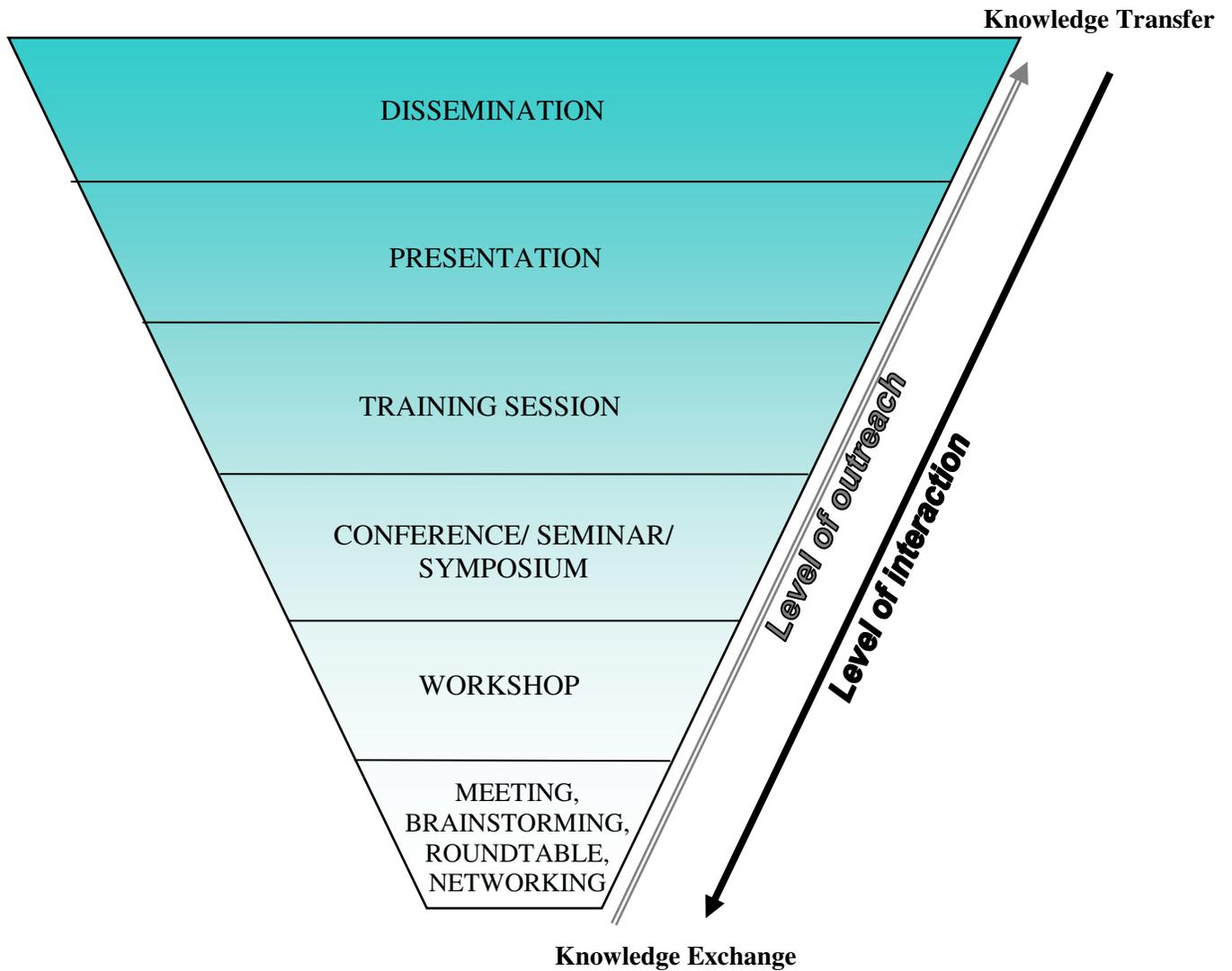


Figure 2: Knowledge Transfer/Exchange Spectrum*



*The arrows point to the higher levels.

Distribution and accessibility

There are various activities through which one can make knowledge accessible to those who need it. In these activities, users are relied upon to search through your website or library, come to your booth, or contact you by phone or email and find the information they need. Your main responsibility, as the knowledge producer or sender, is to create a robust collection of knowledge and make it accessible in various ways. You also need to widely promote the knowledge and the ways through which they are available. The focus of this method is on the process of sending the developed knowledge rather than receiving it.

Doing some form of distribution and making information accessible are very common and many consider this to be the final step of a research project rather than the first step of knowledge transfer. There are tremendous technologies and systems that have been created to connect information seekers to sources. Although it is expected that the use (and sale) of information-search systems will increase in coming years, it seems that this will not be the main trend as the future payoffs will depend on the use of knowledge that is found (Jacobson & Prusak, 2006)

Evaluate distribution and accessibility: You need two parallel mechanisms to evaluate two aspects of these activities. One mechanism should focus on the promotion and accessibility of knowledge to confirm that a large number of organizations and the public are aware of the knowledge and how to reach it. An activity log and website tracking software are good tools to collect enough information or inquiries to indicate the effectiveness of the ways through which the knowledge is accessible (see Tool 1 and 2 of Part III). Another mechanism should focus on users' satisfaction. Website usability test, user satisfaction survey, casual conversations with users, and anecdotal reports are helpful to receive feedback from the users (see Tool 9 and 10 of Part III for examples). Always provide contact information and a message that encourages users to try it again.

Dissemination

Definition:

the process of knowing your clients and systematically providing them, either directly or in partnership with other organizations, with knowledge, strategies, products and support that can enable them to better solve their problems and enhance their ... (*work*).

Thomas Owens (2001). Dissemination: A key element of the ATE
(Advanced technology Education) program.

Retrieved on October 30, 06 from <http://www.wmich.edu/evalctr/ate/ATEpapers/dissemfull.pdf>

Dissemination is a one-way movement of information from producer/sender to potential users/receivers. Dissemination within the context of knowledge transfer differs from the typical scattershot model, where information is broadly transmitted and made widely available. The challenge of dissemination is to prepare a piece of information that is of interest to a large and diversified audience. The advantage of dissemination is the ease of doing it and the high level of control that you, as the producer, have.

The following are some tips for considering the key elements of knowledge transfer or exchange in dissemination planning:

1. Audience: Prepare a list of groups and potential audiences that may have varying interests in the knowledge that is disseminated. To identify your target audience(s), ask yourself:

- Who may find this knowledge useful? What groups are or might be interested in this information?
- What are the potential benefits/problems/risks that this knowledge can address and who may face these issues at this time?
- What would be a common language that groups prefer for the information that is being distributed?
- What would be their common preferred format and medium for the dissemination of this knowledge?
- What are the available distribution lists?

2. Message: The information for dissemination should be clear, concise, and multi-faceted. It also should take into account what you know about your audience. Extract key messages or implications and explain what the information means in a manner that connects it to the audience's practices and real situations. To do this, ask yourself:

- What would be interesting about the topic?
- Is the information relevant to any real situation?
- Is the information actionable? Does it contain any actionable message?
- Does it contain ideas and not just data?
- Is the information concise? Can any part of it be omitted without changing the message?
- How can the content, context, and scope of this information be relevant to all or some of the target groups?

3. Delivery method: Both electronic and print formats of materials can be used for dissemination via mail, emails, web sites, or as handouts during conferences, seminars, ceremonies, and other events.

Short reports², newsletters, fact sheets, information sheets, or tip sheets are examples of materials for dissemination.

4. Evaluation: Defining specific effects that may occur as a result of dissemination can direct your efforts as well as the evaluation of dissemination. To identify the expected effects, ask yourself:

² Short reports are summary documents that highlight the main findings and importance of larger studies.

- What is the purpose of disseminating of this information?
- What are the success factors in this dissemination?
- How important is the total number of distributed materials?
- How important is it to hear back from the receivers of the information?
- What would be an appropriate mechanism for hearing back from the receivers?
- Does the disseminated knowledge encourage receivers to implement it into their work? How?
- Can the disseminated information make the receivers interested about any upcoming information? How?
- Is there any follow-up information that should be disseminated soon?

Evaluate dissemination: A monitoring system is a good tool to track dissemination activities and collect enough information to indicate the effects of this knowledge transfer activity (see Tool 3 of Part III for example). Other tools and techniques such as follow-up surveys, interviews, and anecdotal reports could provide you with more feedback from your audience and direct your future activities. Always provide contact information for questions and inquiries.

Presentation

Definition:

A presentation is a form of communication with an audience. The objective of a presentation is to transmit information and opinions to an audience in your own words, within a limited amount of time.

Retrieved Oct 6, 2006 from http://www.hc.lib.keio.ac.jp/kitie_en/presentation/presentation/02.html

Presenting information in a face-to-face setting allows you to directly connect with your audience, and to receive immediate verbal and nonverbal feedback. As part of a presentation, you need to allow some time for your audience to ask questions. This, however, could be challenging as the presentation time is usually limited. Another challenge is to credibly communicate the importance and applicability of information within the available time. The advantages of a presentation are the use of technology, as an enhancement, and non-verbal communication, as well as the high level of control that the knowledge producer/sender has over the situation.

The following are some tips for considering the key elements of knowledge transfer or exchange in planning for a presentation:

1. **Audience:** To identify the audience for your presentation, ask yourself:

- What group(s) could be concerned about the information that will be presented?
 - How can I reach them? What are the appropriate ways to let them know about the presentation?
 - What are the general demographics of the potential audience?
 - What may be the audience's expectations of this presentation?
 - What group(s) in the audience may have experience or skills related to the information? What do they already know about the topic?
2. **Message:** You need to tailor the content of your presentation to the audience and within the time frame you have. To adapt the content of information, ask yourself:
- What would the audience find interesting about the information? What could be an interesting topic and title for this presentation?
 - What problems or questions should this presentation address?
 - What are the specific subtitles that I need to address to complete the transfer of knowledge? How much time should be allocated to each subtitle?
 - What are the concluding remarks and actionable messages of the presentation?
3. **Delivery Method:** Using visual aids, short examples, or anecdotes during a presentation helps to better engage the audience. Posing and answering questions are techniques to encourage a two-way flow of information and prevent a “knowledge dump.” Also, the pace of presentation should be adjusted to the knowledge the participants may have on the topic.
4. **Messenger:** To identify a messenger for presentation, ask yourself:
- What are the required knowledge and skills for this presentation?
 - Who has the requirements and is available for this presentation?
 - What are his/her credibility and affiliations?
 - How should his/her credibility and affiliations be highlighted to the audience of this presentation?
5. **Evaluation:** To focus the results of your presentation, ask yourself:
- What are the realistic, achievable objectives of the presentation?
 - What are the benefits of this presentation for the participants as knowledge users/receivers?

- What should the audience know, think, believe, or do as a result of participating in this presentation?
- What specific knowledge or message can they take back to their organizations and share?
- How may they feel about the topic at the end?

Evaluate a presentation: Knowledge/skills tests, observation notes, evaluation forms, and anecdotal reports might be the tools and techniques that can be used to evaluate how well the information is understood, as well as the immediate impacts of a presentation (see Tool 4, 9 and 10 of Part III for examples). Always provide contact information for questions, inquiries, and any feedback the audience may have.

Training Session

Definition:

Activities or deliverables designed to enable end users to learn and use new processes, procedures, systems and other tools efficiently and effectively in the performance of their work.

Retrieved on October 30, 06 from www.umkc.edu/registrar/sis/glossary.asp

Training involves an organized attempt to assist learning through instruction, observation, or practice ...

Retrieved on October 30, 06 from www.oup.com/uk/booksites/content/0199253978/student/glossary/glossary.htm

In a training session, a trainer has the main responsibility of transferring his/her knowledge and collecting feedback from trainees by testing their knowledge at the end of session. Training is typically structured as a classroom-type session where an expert or peer educator presents knowledge and provides some customized learning materials. To be most effective, the receivers/users should have opportunities to interact, reflect and act on the received knowledge since people learn best by “doing”.

The advantage of using a training session for knowledge transfer is that both parties are well aware of their roles either as trainers (i.e., knowledge producer/sender) or trainees (i.e., knowledge receiver/user) before coming to the session. The challenge, however, is to keep the trainees active since the imbalance of knowledge between the trainer(s) and the trainees may direct trainees to a passive position.

The following are the key elements to consider when planning a training session:

1. **Audience:** To identify the audience for your training session, ask yourself:
 - Who may need this training? Whose work could be related to the topic of this training?

- How can I reach them? What are the appropriate ways to let them know about the training session?
 - What could be the participants' expectations of this training?
 - What do they already know about the topic? Have they attended any session similar to the topic of this training?
2. **Message:** You need to tailor your training to the audience, the topic, and the time frame you have. To prepare the session, ask yourself:
- Based on the topic, what should be the components of this training? What components are necessary, and what components could be optional to complete this training?
 - Based on the audience, what would they need to learn about this topic, and at what level (e.g., beginning, intermediate, or advanced)?
 - Based on the number of components and level of training, how much time should be allocated to each component?
 - How and when should the trainees participate in the session?
 - What “real-life” examples can be included in the training?
 - What are the follow-up actions of this training?
3. **Delivery method:** Using visual aids, flow charts, as well as supplementary teaching devices (e.g., books, journals, articles, calculators, games) helps to better transfer knowledge for the purpose of training. Breaking the training session into short parts can give the trainees time to reflect on, and assimilate, what they have learned. Role-playing or skits related to the topic are techniques that could increase the trainees' participation and create a positive atmosphere for learning and interaction.
4. **Messenger:** To identify a messenger for the training session, ask yourself:
- What are the required knowledge and skills for this training?
 - Who has the requirements and is available for this training?
 - What are his/her credibility and affiliations?
 - How should his/her credibility and affiliations be highlighted to the audience of this training?
5. **Evaluation:** To identify the potential impact of the training session, ask yourself:
- What are the realistic, achievable objectives of the presentation?
 - What should the trainees know, think, believe, or do as a result of participating in this training session?

- How may they feel about the topic at the end?
- What are the benefits of this session for the trainees (i.e., knowledge users/receivers)?
- Are there any follow-up actions that trainees should do?
- Are there any follow-up actions that trainers should do?

Evaluate a training session: Knowledge/skills tests, observation notes, evaluation forms, and anecdotal reports could be the tools and techniques to evaluate how well the information is understood, as well as the immediate impacts of a training session (see Tool 5, 9 and 10 of Part III, for examples). Always provide contact information for questions, inquiries, and any feedback they may have.

Conference/ Symposium/ Seminar/ Webinar/ Forum

Definitions:

Conference: Participatory meeting designed for discussion, fact-finding, problem solving and consultation. Normally small in scale and select in character - features which tend to facilitate the exchange of information. The term "conference" carries no special connotation as to frequency. Though not inherently limited in time, conferences are usually of short duration with specific objectives.

Retrieved on October 6, 2006 from Pacto Convex. <http://www.pacto-convex.com/glossary.htm>

Symposium: A larger (more than 30 people) gathering of individuals in a specific field of study or practice, who are meeting to forward a research agenda, achieve a specific outcome, or produce a product.

Retrieved on October 6, 2006 from Canadian Institute of Health Research. <http://www.cihr-irsc.gc.ca/e/4112.html>

Seminar: Any meeting for exchanging information and holding discussions.

Retrieved on October 6, 2006 from Training Consortium. <http://www.trainingconsortium.com/register/registerDef.php>

Webinar: Short for Web-based seminar, a presentation, lecture, workshop, or seminar that is transmitted over the Web. A key feature of a Webinar is its interactive elements -- the ability to give, receive and discuss information. Contrast with Webcast, in which the data transmission is one way and does not allow interaction between the presenter and the audience.

Retrieved on October 6, 2006 from <http://www.webopedia.com/TERM/W/Webinar.html>

Forum: A public meeting or assembly for an open discussion of by recognized participants on subjects of public interests.

Retrieved on October 6, 2006 from Pacto Convex. <http://www.pacto-convex.com/glossary.htm>

This section explains a variety of knowledge transfer and exchange activities that are initially organized to bring a group of people together for various purposes such as discussion, presentation or networking. These people are assumed to have some common interests, experiences, knowledge, skills, or expertise. During these activities, the role of the knowledge

producer/sender and the knowledge receiver/user may change/shift as various opportunities are provided for all participants to exchange their knowledge or just transfer it.

The advantage of using these activities for knowledge transfer and exchange is the high commonality that usually exists among participants, allowing the interaction and two-way flow of knowledge to easily happen. The challenge, however, is to ensure that the participants can observe the commonality and communicate properly in a collaborative atmosphere.

When planning for any of these activities, the following are the key elements that should be considered:

1. **Audience:** To identify the audience for a conference, symposium, seminar, webinar, or forum, ask yourself:
 - Who has expertise or experience in the topic?
 - Who is involved in the topic? Whose work could be related to the topic?
 - Who may have some interests in the topic?
 - How can I reach them? What are the appropriate ways to let them know about the event?
2. **Message:** You may need to communicate with some experts about the topic of your event and its content. To do it, ask yourself:
 - Who are the well-known or significant people that could be contacted about the content of this event? How accessible are they? What is the appropriate way to use their expertise?
 - What is the appropriate topic to open the event and by whom? Who are the leaders, experts that could be invited as a key-note speaker?
 - What topics would the participants prefer to discuss in a structured setting?
 - What topics would the participants prefer to share and communicate in an unstructured setting?
 - How much time is required for structured events and how much time is required for social/ networking events?
 - What could be the participants' expectations of this event?
3. **Delivery method:** The event should be conducted in a way that makes it both informative and enjoyable. The purpose of the event is to provide participants with situations in which they can easily express their opinions and perspectives, exchange their knowledge and experiences, or enjoy peer-to-peer learning. The location and facilities of the event are important in order to organize various sessions and create a positive atmosphere for sharing. If the event has a list of delegates, ask for the agreement of participants prior to distributing the list.

4. **Evaluation:** To identify the potential outcomes of this type of events, ask yourself:

- What are the realistic, achievable objectives of the event?
- Did it provide opportunities for both knowledge transfer and knowledge exchange?
- What should the participants take with them from this event?
- What are the benefits of this event for the participants? In the short-term? In the long-run?
- How satisfied are the participants?

Evaluating a conference, symposium, seminar, webinar, or forum: Use of evaluation forms is the most common way to evaluate these events. In addition, observation notes and anecdotal reports are tools that can capture the successful parts of the event and the parts that should be improved (see Tool 6, 9 and 10 of Part III for examples). The evaluation can be completed by discussing the collected information with the organizers and presenters in a meeting. Always provide contact information for questions, inquiries, and any feedback the participants may have afterwards.

Workshop

Definition:

A set of activities designed to promote learning, discussion and feedback about a topic or event.

Retrieved on October 30, 2006 from www.evaluateit.org/glossary/

A meeting attended by users and developers to create a plan, specification or other documentation that can guide the developers in their development tasks... A meeting designed to facilitate interaction and the exchange of information between individuals.

Retrieved on October 6, 2006 from www.georgetown.edu/uis/ia/dw/GLOSSARY0816.html

A workshop is a setting that is planned for interaction, sharing information, and active learning. By having a limited number of people who are highly interested in a topic, a workshop encourages participants to learn from each other or to adopt an innovation into practice. A workshop facilitator has a crucial role in making the workshop more interactive by planning various activities and organizing an agenda that allows participants to get to know each other and to share experiences. Through a workshop, the knowledge producer/sender and the knowledge receiver/user should have equal levels of control and feel supported to exchange their knowledge and experiences.

One key to having a successful workshop for knowledge transfer and exchange is to have a limited number (no more than 35) of homogeneous people to work with and give participants some time to present their knowledge/experiences and actively engage them in the workshop. The challenges, however, are to find a skilled facilitator and have creative ideas for the

participants' activities and to make the event different from a presentation or a training session.

The following are the key elements that should be considered when planning a workshop:

1. **Audience:** To identify the audience for a workshop, ask yourself:
 - Who might be interested in the topic of this workshop? Whose work is related to the topic?
 - To whom could this workshop be beneficial?
 - How can I reach them? What are the appropriate ways to let them know about the workshop?
2. **Message:** You need to tailor the format and content of the workshop to the audience. To identify the content of the workshop, ask yourself:
 - What background or experience might the participants have on the topic of this workshop?
 - What are the participants' expectations of this workshop?
 - What type of workshop would best meet the participants' needs and expectations (e.g., discussing ideas, problem-solving, practicing skills, etc.)?
 - What is the plan for this workshop? What is the agenda?
 - What are the facilitator's responsibilities and activities?
 - What pre-workshop materials might be needed?
 - What supplies and educational materials (e.g., flipchart paper, handouts, etc.) are needed when delivering the workshop?
 - What activities are needed to stimulate participants' learning?
3. **Delivery method:** The workshop should be conducted in a way that makes it both informative and enjoyable. A workshop should provide the participants with opportunities to easily express their opinions and perspectives, get to know each other and network, share their knowledge and experiences, practice new skills, and also enjoy the learning exercises. Having an appropriate workshop area and room setting are important in order to stimulate participants' activities.
4. **Messenger:** In a workshop setting, the facilitator should play the role of a messenger, when required. To identify a facilitator, ask yourself:
 - What are the required knowledge and skills for this workshop?
 - Who has the requirements and is available for this workshop?

- What are his/her credibility and affiliations?
- How should his/her credibility and affiliations be highlighted to the audience of this training?
- When and how should we discuss the facilitator's responsibilities and activities?

5. **Evaluation:** To identify the potential outcomes of a workshop, ask yourself:

- What are the realistic, achievable objectives of the workshop?
- What knowledge/attitudes/skills may change as a result of participating in this workshop?
- What will participants take back with them to their organizations, networks, etc.?
- How can the skills learned in this workshop improve the participants' practices?
- Will the workshop provide enough opportunities for knowledge exchange?
- What are the benefits of this workshop for the participants? In the short-term? In the long-run?
- How satisfied are the participants?

Evaluate a workshop: The use of evaluation forms is the most common way to evaluate a workshop. In addition, observation notes and anecdotal reports are tools that can capture the successful parts of the workshop, as well as the parts that should be improved (see Tool 7, 9 and 10 of Part III for examples). Follow-up surveys, interviews, case studies, on-site visits, and knowledge/skill tests may also be used for a workshop evaluation. Always provide contact information for questions, inquiries, and any feedback the participants may have afterwards.

Meeting/ Brainstorming/ Roundtable / Networking

Definitions:

Meeting: An assembly or gathering of people exchanging knowledge for some common purpose in a limited period of time.

Retrieved on October 6, 2006 from Fauconnier, S., & Fromme, R. (2003) Capturing Unstable Media
http://capturing.projects.v2.nl/glossary_k.html

Brainstorming: a group process for developing creative solutions to problems. It works by focusing on a problem, and then deliberately coming up with as many solutions as possible and by pushing the ideas as far as possible.

Retrieved on October 6, 2006 from Steege, Sue. (n.d.). What is Brainstorming?
<http://www.buffalostate.edu/orgs/cbir/readingroom/html/Steege-99.html>

Roundtable: moderated discussions among invited participants that focus on a specific topic. Participants share expertise and learn from the experiences of others. Participants usually number less than 30.

Retrieved on October 6, 2006 from Joint Fire Science Program. (n.d.). Research Supporting Sound Decisions.
<http://jfsp.nifc.gov/documents/Roundtable.pdf#search=%22what%20is%20a%20roundtable%22>

Networking: can be defined as a system of interconnected individuals that interact with each other for mutual assistance or support.

Retrieved on October 6, 2006 from Canadian Health Services Research Foundation.
http://www.chsrf.ca/knowledge_transfer/index_e.php

This section explains a group of knowledge transfer and exchange activities that are designed to help people share information and ideas in a structured environment. The scope of these activities can go beyond the exchange or transfer of knowledge. These activities can generate new ideas, find solutions to a problem, build relationships, and create opportunities for innovations. In these settings, there is no boundary between knowledge producer/sender and knowledge receiver/user and both parties can benefit from the experience.

The advantage of these knowledge transfer and exchange activities is that they can create an opportunity in which the knowledge will not only flow among participants but it will grow. The challenge, however, is to make sure that the participants bring diversified experiences, perspectives, opinions, and ideas to the table, and that they are willing to communicate and examine their ideas. Efforts should be taken to ensure that everyone has an opportunity to participate and that all voices are heard.

The following are the key elements that should be considered when preparing any of these activities:

1. **Audience:** Knowing your audience can help organize a meeting, roundtable, brainstorming, or networking that promotes interaction and participation. You need to carefully select the participants for any of these activities in order to make them effective. To identify the audience, ask yourself:
 - Who is involved in the topic of this activity? Whose work could be related to the topic?

- Who would benefit from the activity?
- Whose participation could be beneficial to us?
- What experience do potential participants have that are relevant to the topic? Do they bring diversified experiences, perspectives, opinions, or ideas to the table?
- What practical problems do they face? What issues do they struggle with?
- How can I reach them? What are the appropriate ways to let them know about it?

2. **Message:** You need to focus on the topic and process since as an organizer, you should let the participants lead the content of these highly interactive activities. Ask yourself:

- What are our expectations of this activity?
- What is the appropriate topic?
- Are there any central messages or points of interest that should be discussed/introduced? What is the best way to introduce them?
- What is the agenda?
- What are the chair's/organizer's responsibilities?
- What are the participants' responsibilities?
- What can facilitate effective communication and a positive environment for generating creative ideas (particularly for brainstorming)?
- What can lead to ongoing dialogue and mutual collaboration (particularly for networking)?
- What materials or resources can be shared?
- What supplies and materials are needed when conducting the activity?
- What materials, if any, do the participants need in advance?

3. Delivery method: These activities should facilitate the expression of ideas, opinions and perspectives. The room setting is important in order to stimulate participants' engagements.

4. Evaluation: To identify the potential outcomes of these activities, ask yourself:

- What are the realistic, achievable objectives of this activity?
- What knowledge/idea/solution could be developed as a result of conducting this activity?

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- How will the knowledge that is transferred or exchanged in this activity influence action?
- What will participants take back with them to their organizations?
- Will the activity provide enough opportunities for knowledge exchange? If so, is it a successful exercise of knowledge exchange?
- What are the benefits of this activity for my organization? In the short-term? In the long-run?
- How satisfied are the participants?

Evaluate a meeting/brainstorming/roundtable/networking: Evaluation forms and documentation (e.g., minutes) are common tools used to evaluate these activities. Observation notes and anecdotal reports could be informal ways to complete your information (see Tool 8, 9 and 10 of Part III for examples). Also, a brief review and discussion added to the wrap-up session of the activity can be used to obtain the participants' immediate feedback. Always encourage the participants to send you their feedback, if they prefer to do it privately.

Part III: Examples of Evaluation Tools for Knowledge Transfer and Exchange

Tool 1³: Distribution/Promotion Tracking Log

Type of Activity	
Frequency	
Date(s)	
Start	
Finish	
Methods (web site, emails, media release, other events)	
Outputs (e.g., flyers, news letters, reports, information sheets)	
Resources used (for preparation and conduction)	
Staff	
Time	
Budget	
Amendments	
Comments	

³ This tool was used by the Canada Volunteerism Initiative (CVI) centres in 2006-2007 and modified for this framework.

Tool 2: Contact Tracking Log for Inquiries

(A) Record of Contacts for Inquiries						
Name	Position	Organization Name	Organization Address	Organization Type	Date of Contact	Type of Inquiry

(B) Record of Responses to Inquiries					
Staff Name	Position	Staff Response Date	Staff Response Format	Response Content (Summary)	Satisfaction with Response

Tool 3⁴: Dissemination Monitoring Tool

Type of Material	
Brief description of material(s) disseminated	
Method(s) of dissemination	
Date	
Expected results	
Audience	<input type="checkbox"/> Organization(s) <input type="checkbox"/> Individuals <input type="checkbox"/> Other
Brief description of audience	
# of people/ organizations reached	
Outputs	Quantity distributed
Information resource(s)/materials used:	
Results	
Results achieved	
Feedback received from audience	
Other feedback/observation	
Comments/Notes	

⁴ This tool was used by the Canada Volunteerism Initiative (CVI) Local Networks in 2006-2007 and modified for this framework.

Tool 4⁵: Evaluation form for Presentations

PRESENTER: _____

TOPIC: _____

DATE AND LOCATION: _____

Strongly disagree = 1 Disagree = 2 Agree = 3 Strongly agree = 4

1. Using the scale above, please circle a number to indicate the extent to which you agree with the following statements:

a. The information presented was relevant to me.	1	2	3	4
b. The presentation helped me to identify interesting resources for my organization/community.	1	2	3	4
c. I feel confident to talk with my colleagues/network/organization about the information in this session.	1	2	3	4
d. The overall session increased my understanding about (...name topic of presentation...).	1	2	3	4
e. The overall session provided a good networking opportunity.	1	2	3	4

2. List two ways you will share what you learned in this presentation.

a.

b.

3. What was most valuable about this presentation?

4. What things were not covered that would have been informative?

5. Do you have any general comments or suggestions?

6. Please tell us about yourself. Are you a(n):

Board Member

Paid staff

Volunteer

Executive Director

Government employee

Other: _____(please specify)

THANK YOU!

⁵ This tool was used by the Canada Volunteerism Initiative (CVI) Local Networks in 2006-2007 and modified for this framework.

Tool 5⁶: Training session feedback form

Please complete the following form by offering your honest and constructive comments that could help us improve the process, content, format, etc. for future activities. Your comments will be carefully considered. Thank you!

Overall thoughts

If any, what were your initial expectations for the session?
Was the session different from your expectations? How?
In your opinion what were the session's strengths?
Please suggest possible areas of improvement.

Please rate and comment our ability to conduct this session successfully.

This session offered a balance between theoretical presentations and opportunities to share practical experiences or develop strategies for applying the knowledge. <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat Comment / Suggestions for improvement:
The knowledge was presented in ways that make its usefulness apparent to you. <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat Comment / Suggestions for improvement:
The session offered sufficient time and opportunities to connect and share ideas with other participants. <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat Comment / Suggestions for improvement:
The information provided was clear, concise, and related to your work.

⁶ This tool was used in Canadian Code for Volunteer Involvement, Train-the-Trainer Session, October 2006 and modified for this framework.

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Yes No Somewhat

Comment / Suggestions for improvement:

As a result of attending this session, you are more confident and encouraged to talk about (... topic of training).

Yes No Somewhat

Comment / Suggestions for improvement:

The tools provided and information shared will be useful to you in your role.

Yes No Somewhat

Comment / Suggestions for improvement:

You enjoyed the style of presentation, discussions, and time allocation to each part.

Yes No Somewhat

Comment / Suggestions for improvement:

Please provide additional thoughts, concerns, and recommendations:

Thank You.

Tool 6⁷: Evaluation form for Conference/Seminar/Symposium

Please help assess the (...name of Conference/Seminar/Symposium...) by completing the attached form. Your input is valuable to us. Thank you!

(OPTIONAL)

Name:

Title:

Organization:

Address:

Telephone: ()

E-mail:

1. Logistics

a) *Opportunity for (...stakeholders...) input into (...event...) design*

1 2 3 4 5
(Poor.....Excellent)

b) *Ease of Registration*

1 2 3 4 5
(Poor.....Excellent)

c) *Delegate Kit*

1 2 3 4 5
(Poor.....Excellent)

d) *Hotel (location, facilities, cleanliness, etc.)*

1 2 3 4 5
(Poor.....Excellent)

e) *Food and Beverages*

1 2 3 4 5
(Poor.....Excellent)

⁷ This tool was used in SMC/ CVI Forum, September 2006, and modified for this framework.

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2. Conference/Seminar/Symposium Content

a) *The primary goal of this year's (...event...) was to provide an opportunity to (... goal...) .*

To what extent were we successful in achieving this goal?

1 2 3 4 5
(Poor.....Excellent)

b) *Please rate how successful the (...event...) was at achieving the following:*

(...goal #1) ...

1 2 3 4 5
(Poor.....Excellent)

(...goal #2) ...

1 2 3 4 5
(Poor.....Excellent)

(...goal #...) ...

1 2 3 4 5
(Poor.....Excellent)

Providing networking opportunities.

1 2 3 4 5
(Poor.....Excellent)

3. Were we successful in finding a balance between educational workshops, discussion time, and networking occasions?

Yes

No

4. Are there specific topics that you feel we should consider for future (...events...)?

5. What were the (...event's...) strengths?

6. Do you have suggestions for possible areas of improvement?

7. How would you rate the (...event...) as a whole?

1 2 3 4 5
(Poor.....Excellent)

8. Please provide additional thoughts and overall comments about the (...event...):

Thank You.

Tool 7⁸: Workshop evaluation form

(Title of Workshop)

Please take a few moments to indicate your knowledge of the workshop topic.

A) Answer this section BEFORE the workshop.

	Poor	Fair	Good	Very Good	Excellent
Workshop Main Topic					
My understanding of this topic is:					
My ability to talk about this topic is:					

B) Answer this section AFTER the workshop.

	Poor	Fair	Good	Very Good	Excellent
Workshop Main Topic					
My understanding of this topic is:					
My ability to talk about this topic is:					

1. Please rate the quality of the following workshop components.

	Poor	Fair	Good	Very Good	Excellent
Advertising, Registration, Location					
Advertising and promotion					
Registration procedure					
Suitability of location					
Space/facilities					
Workshop Content					
Clarity of content					
Order and organization of content					
Usefulness of materials/information resources					

⁸ This tool was used in Knowledge Development Centre Fall 2006 workshops (tailored to the topic of workshop) and modified for this framework.

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Length of workshop					
Workshop Presentation					
Style of the main topic presentation					
Style of the presentation					
Usefulness of the presentation					
Time allotted for discussion					
Wrap-up discussion on sharing the knowledge					

2. Did this workshop meet your expectations?

Yes ___ No ___ Not sure ___

3. Will you share the knowledge you received in this workshop with others?

Yes ___ No ___ Not sure ___

If yes, who/what organization do you think will find this knowledge useful?

- a) _____
- b) _____
- c) _____

4. How do you think this knowledge can be put into practice in your organization?

- a) _____

- b) _____

5. Please suggest any improvements for future workshops on knowledge transfer:

a) _____

b) _____

6. Any other comments?

Please return this form to ... staff.
Thank you.

Tool 8⁹: Meeting evaluation form

Please complete the following form to help us improve future meetings. Your comments will be carefully considered. Thank you!

1. Were you provided with the necessary documents to prepare for the meeting before hand?

_____Yes_____No If not, please explain.

2. Are there specific topics that you feel have been missed today and should be considered for future meetings?

3. Please rate our ability to meet your expectations for the session using the following scale. Do so by circling the number that most closely represents your evaluation of the session:

PARTICIPANT GROUP A: (... name of the group ...)

Session	Very Poor	Poor	Fair	Good	Very Good	Excellent
(...name session 1...)	1	2	3	4	5	6
(...name session 2)	1	2	3	4	5	6
(... about content ...)	1	2	3	4	5	6
(... about content ...)	1	2	3	4	5	6
Group Discussion	1	2	3	4	5	6

PARTICIPANTS GROUP B: (... name of the group ...)

Session	Very Poor	Poor	Fair	Good	Very Good	Excellent
(...name session 1...)	1	2	3	4	5	6
(...name session 2)	1	2	3	4	5	6
(... about content ...)	1	2	3	4	5	6
(... about content ...)	1	2	3	4	5	6
Group Discussion	1	2	3	4	5	6

4. How would you rate the meeting as a whole?

⁹ This tool was used in CVI Local Network Coordinators Meeting, September 2006, and modified for this framework.

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Unsuccessful

1

2

3

4

5

Very Successful

6

5. Were your expectations for the session met?

6. What have you learned from this session?

7. How will you use the information from this session?

8. How can we improve this session?

Thank You!

Tool 9¹⁰: Observation tool for Training, Seminars, Workshops, and Meetings

EVENT TOPIC:	DATE:
OBSERVER:	# of PARTICIPANTS:

As an observer, the personal experience you obtain in this (...name activity...) is invaluable. Your observation will complete the information captured by (...name activity...) evaluation forms. It also can lead us to appropriate follow-up actions. Please ensure that your notes are descriptive enough to let us understand what occurred and how it occurred.

1. SETTING

a. How would you rate the following aspects of the (...name activity...) setting? Please circle one for each item and provide your comments or explanations.

- Reception/welcome: Worked Did not work
Why?
- Size of room: Worked Did not work
Why?
- Seating arrangement: Worked Did not work
Why?
- Additional supplies: Worked Did not work
Why?
- Audiovisual equipment: Worked Did not work
Why?
- Wrap up of (...name activity...): Worked Did not work
Why?

b. What else did you observe regarding the appropriateness of the (...activity...) setting?

¹⁰ This tool was used in Knowledge Development Centre workshops, 2006, and modified for this framework

3. FACILITATOR

How was the facilitator's presentation style/skills and knowledge? (*e.g., established rapport, capable of transferring knowledge, used plain language, responded to audience*)

4. PARTICIPANTS

- a. What types of participants attended the (...activity...)? Was there a good participant mix?
- b. Did you observe any evidence (i.e., examples) that indicate the participants were:
- Keen/interested in the information?
 - Actively engaged?
 - Passive and bored?
 - Confused?

Tool 10¹¹: Anecdotal Record form

Anecdotes, what you hear from participants, help provide a rich account of how individuals experience an activity. Recording anecdotes will complete the information captured by the (...name activity...) evaluation forms. Remember to separate your observations from your opinions and to record only the facts.

Date: _____

Context/Event: _____

What was said?

By whom (name and position)?

The Key point/idea:

Your reflections or impressions:

¹¹ This tool was used by the Canada Volunteerism Initiative (CVI) Local Networks in 2006-2007 and modified for this framework.

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