Research Communication Training Module

Summarized by Charles Okigbo

Based on

The Knowledge Translation Toolkit: Bridging the Know/Do Gap – A Resource for Researchers

Edited by

Gavin Bennet and Nasreen Jessani
(forthcoming)
Table of Contents

The book has the following five sections and 15 chapters, which are summarized for easy use in this portable training module.

SECTION A: THE CONCEPT
Chapter 1: Knowledge Translation – An Introduction
Chapter 2: Knowledge Management
Chapter 3: Evaluative Thinking

SECTION B: THE AUDIENCE
Chapter 4: Context Mapping
Chapter 5: Bringing in the Demand

SECTION C: THE MESSAGE
Chapter 6: Communication Strategy

SECTION D: THE MEDIUM
Chapter 7: Print Media
Chapter 8: multimedia
Chapter 9: Social/popular Media

SECTION E: THE TOOLBOX
Chapter 10: Communications Strategy
Chapter 11: The Two-Pager: Writing a Policy Brief
Chapter 12: The Conference 2.0
Chapter 13: Tapping Technology
Chapter 14: Word Processing: Creating a Newsletter
Chapter 15: Monitoring & Evaluation: Frequently Asked Questions
SECTION A: The Concept.

This section has three chapters which deal with an introduction to knowledge translation, knowledge management, and evaluative thinking.

Chapter 1: Knowledge Translation

Introduction:
Knowledge translation is the intersection of two important processes – research and action. It brings the two processes together through a communicative relationship which relies on the partnerships, collaborations, and personal contact between researchers and people who use research results.

Although the concept of knowledge translation has existed for many decades, it came to greater notice in the last seven years, following the 2004 Mexico City Ministerial Summit of Health Ministers which drew attention to the “know-do” gap. The Summit called for increased involvement of people who need research results for policy making. Evidence-based health policy making requires “knowledge brokering” and the involvement of potential users of research in setting research priorities.

The Declaration of Mexico City was made with enthusiasm but without clear guidelines on how to achieve the goals of knowledge brokering and knowledge translation. Since then, much new attention has been directed to strategies for disseminating research results to program implementers and policy makers. This is facilitated by better understanding of the principles and models of knowledge translation.

KT Principles:
Three KT principles which are now in common use are knowledge, dialogue, and capacity.

Knowledge – refers to the assemblage of research results to form a body of useable new knowledge base.

Dialogue – the relationships that underline KT must be created and sustained through regular dialogue and exchange.
**Capacity** – there is need for new skills for researchers, decision makers and other users of research results who are guided by the common goal of addressing social problems with new knowledge.

**KT Models**
Understanding the KT process is made easier by recourse to four simple KT models which are push, pull, exchange, and integrated.

**Push Model:** The knowledge of researchers is primarily packaged for dissemination to users (policy makers, journalists, and program implementers) through such tools as policy briefs, news releases, fact sheets, videos, and synthesis reports, among others. This is a supply mode.

**Pull Model:** Where as the push model disseminates packaged research results to users, the pull method shifts the focus of action on research users. Research users ask for or demand the new knowledge from researchers so that their policy making or interventions would be based on research evidence. This is a demand mode.

**Exchange Model:** This rests on partnerships with researchers, research communicators and other research publics who collaborate for their mutual benefit. Such partnerships can take many forms and may occur at different times in the research process.

**Integrated Model:** The exchange model can often take on more sophisticated and multilevel exchanges that reflect integration of many actors and organizations in a Knowledge Translation Platform (KTP) that fosters linkages and exchanges across the social system. KTP is the exchange model writ large to connect the needs of evidence-based policy with the results of researchers to energize public dialogue with an understanding of research processes and research evidence.

**Knowledge Translation at Work:** Bringing Research Alive. The four models make it easier to picture the linkages between researchers and research users. They do not provide all-purpose explanations, but rather show that different situations will require different approaches. In the real world of sharing research results with research users, different contexts will require different models and strategies. City-level efforts will differ from country-wide or pan-continental efforts.

The next chapter explains knowledge management, of which knowledge translation is an important aspect.

Chapter 2: Knowledge Management

Knowledge can be broken down to explicit and tacit information. Whereas the former is out there (can be written down), the latter is implicit or in our heads. By knowledge management is meant the knitting together of both types of information, i.e. information that is out there and in our heads. This requires asking some basic questions, such as:

Do we know what we do know?
Do we know what we need to know?
Do we know where to get the information?

Knowledge management involves creating, identifying, capturing and sharing the right kind of information in the right contexts of place and time to influence relevant action or a decision.

There is always more information and knowledge than we can use at any time, and so there is need for good planning and strategies to optimize results. Thus, it is important to come up with a well thought-out KM strategy.

What is a KM Strategy? It is a carefully crafted communication plan for sharing selected information that addresses three basic questions:
Where are we now? What kind of knowledge do we need to achieve our goal or objective?

Where do we want to be? How will the deployment of the information change our situation?

How do we get there? What steps do we take to achieve our objectives? This often involves three elements of people, processes, and technology.
An important first step in designing a good KM strategy is conducting a knowledge audit which assesses the organization’s knowledge resources and gaps. Knowledge audits are situation analyses that reveal how an organization stands in relation to its knowledge needs and assets. A good knowledge audit can help us achieve these four objectives:

- Identify knowledge needs
- Conduct a knowledge inventory
- Analyze knowledge flows
- Create a knowledge map.

**Knowledge Harvesting:** Because there is always more information than we need in any situation, it is imperative to have a mechanism for capturing only the most appropriate explicit and tacit information we need. This is knowledge harvesting and it involves:

- Focus – identifying the specific knowledge we need.
- Find – Locating the repository of the knowledge.
- Elicit – Harvesting or gathering the relevant information.
- Organize – Arranging the gathered information for easy use
- Package – Putting the information in appropriate formats for use
- Share – Disseminating the packaged knowledge with the relevant publics.
- Apply – Using the knowledge to address problems.
- Evaluate and adapt – Assessing our performance and making adjustments where necessary

**Best practices**, by which we mean useful case studies that point to the way we can use knowledge management can provide illustrative examples for us to adapt from.
**Communities of practice** are groups of practitioners who share a common interest or passion in an area of competence and are willing to share the experiences of their practice. These are some of the ways of popularizing knowledge management.

The next chapter presents a discussion of evaluative thinking, which is the important process of asking critical questions to assess our explicit and implicit knowledge.

**Chapter 3: Evaluative Thinking**

Successful knowledge translation requires a questioning frame of mind or a philosophy of action that is based on questioning, reflecting, learning and modifying our explicit and implicit knowledge. It should go on continually, involving the interrogation of available information, the acquisition of new knowledge, the adaption and adjustment to a new situation, as the case may be. Such a philosophy is most evidently practiced in a learning organization.

**Learning Organization:** This is an organization that is dedicated to generating lessons and then using these to modify its core operations. According to Peter Senge, learning organizations nurture new ways of thinking “where people are continually learning to see the whole together.”

**Evaluative Thinking Tools.** There are many tools for practicing evaluative thinking. Among these, the following eight are commonly used by many organizations:

Most Significant Change – This is the recording and/or recounting of the strongest aspects of change to serve as lessons in knowledge translation.

Appreciative Inquiry – This looks at past performance to capture the essence of the experience.

After Action Review – This is an open and participatory process to understand what happened, why, and how, as lessons for improvement.

Horizontal Evaluation – This requires having like-minded peers to assess the situation.
Impact Logs - This is a simple and informal record of impacts or influence that may include stakeholder feedback and anecdotes.

Formal Surveys – This is useful for eliciting information from a large number of people.

Rapid Appraisal Methods – These are fast means of assessing performance using direct observations, key informant interviews, focus groups, and community group interviews, among other methods.

Rapid Appraisal through Key Informant Interviews – based on their particular experience and relevant knowledge, key informants can be selected and interviewed to obtain qualitative information which can have limited value due to interviewer and interviewee biases.

Rapid Appraisal through Focus Groups – are useful methods for holding discussions with eight to 12 people who are purposively selected and collectively interviewed for their knowledge, attitudes, and behavior. A facilitator keeps the dialogue going and ensures all voices are heard.

Rapid Appraisal through Community Group Interviews – take place in a group setting with the discussion primarily being between the participants and the interviewer. These are often open to all interested community members, and thus can be useful for community needs assessments and for gauging project progress or impact.

Rapid Appraisal through Direct Observations – are useful for collecting on-the-spot information about ongoing projects, using paper and pencil and a keen eye for what is going on.

Performance Indicators – These are measurements of tangible results used to assess progress according to predetermined objectives, which should ideally be SMART (Specific, Measurable, Achievable, Realistic, Time-bound).

Evaluative thinking should become a way of operating in learning organizations. To create an evaluative thinking strategy, we should start with a self-assessment survey, using an instrument such as the Bruner Foundation’s Evaluative Thinking Self-Assessment Tool. Secondly, an external consultant can be used to guide strategy formulation by conducting key-informant interviews, using some direct observation techniques,
reviewing some impact logs, and conducting most-significant-change workshops, or using some appreciative inquiry approaches.

The last three chapters have set the tone for the rest of the materials by explaining knowledge translation, knowledge management, and evaluative thinking. The next section (Section B) is on the audience, and it has two chapters that explain context mapping and bringing in the demand.

SECTION B: THE AUDIENCE

This section has two chapters which explain mapping the context and creating the demand in knowledge translation.

Chapter 4: Context Mapping

Understanding the context of our research and its results is critical in making the best use of those results. By context is meant the setting and situation in which the action takes place, involving anything and everything from climate to politics; economics to culture; and people, personalities and prejudices to history, technology and fashion.

Context is a primary determinant of every What, Where, Why, Who, When, and How question we encounter. Context questions are also encountered when we consider the purpose of the message, the nature of the audience, and the channels to use to be maximally effective.

By context mapping, we mean a proper appreciation of the setting of the research or the social environment in which the research is situated. Context mapping is the KT process or tool for identifying, expressing, and addressing relevant context or situational issues.

The starting point in context mapping is a clear definition of the objective of the research, which leads to an exploration of the forces that may act upon the mission – some positively and others negatively - from the beginning to the end. This analysis or mapping exercise is then used to design strategies that avoid problems, overcome obstacles, take advantage of opportunities, and deliver desirable results with optimal impact.

The Dynamics of the Policy Environment:
The environment for research use is dynamic and ever changing. This demands that we be vigilant and active students of the situations through continuous surveillance and mapping. The following questions should guide our approach to the proper use of context mapping in translating research results for our relevant audiences:

What are we trying to achieve?

Who, precisely, is our target audience?

Who are the most important actors?

What level are we trying to influence?

How politicized is the issue?

What are the information needs of the target audience?

**Context Mapping Tools:**
To do context mapping effectively, we need tools that facilitate the usual processes for stakeholder analysis, audience analysis, and target segmentation. Among the common mapping tools are:

**Force Field Analysis** – which looks beyond actors to identify the different forces of influence, taking note of pressures for and pressures against a proposed change. The data could come from interviews, literature reviews, and stakeholder workshops. The final result is a decision guide on the likely effect or impact of the “forces for change” on our KT project.

**Policy Network Mapping** – deals with those situations where we need to bypass less relevant actors to focus on only those who are really concerned by, or can influence projects, proposals, and policies. Decisions to use research results for interventions or policies are often made by more than one individual or institution. It is useful therefore to identify the relative significance of the network of individuals, groups, and organizations (sometimes even countries) that can play key roles in those decisions.

**Influence Mapping** – identifies the individuals and groups with the power to influence a key decision relating to research uptake. This can sometimes be referred to as Stakeholder Influence Mapping, Power Mapping or Arenas
of Influence. Decision makers are not islands onto themselves; they are individuals who can be influenced by other individuals. Additionally, they have different motives for their actions. Influence mapping is useful for identifying decision makers and those who can influence them.

It is possible to identify five distinct stages in the policy making process, and thus map out the best strategies for using research evidence to best advantage at each stage. The hour-glass figure shows the potential degree of influence we can exert at each of the five key stages of agenda setting, identification of policy alternatives, policy formulation, policy implementation, and evaluation. The greatest influence is at the agenda-setting and evaluative stages, with the least at the policy formulation stage. This is not to deny that research evidence is needed at each of the five stages, although we have to expect differing levels of influence.

**Agenda-setting** – where we manage to direct the attention of policy makers (directly or indirectly through cause groups or lobbyists) to our issues. Useful agenda-setting tools include public education and outreach, media campaigns, coalition building, and stakeholder meetings.

**Identification of policy alternatives and policy formulation** – Even with successful agenda-setting, policy makers usually examine possible solutions before they select one. Research evidence plays an important role in the consideration of possible solutions. In the absence of such evidence, personal interests, lobby-group pressures, “colloquial evidence” and simple negligence can become predominant.

**Policy implementation** – policy in the books is not useful until it is implemented. Researchers need to help set standards and criteria to increase the chances of policy implementation.

**Monitoring and Evaluation** – The policy cycle ends with strategies that can measure effectiveness and show what lessons should inform future policy decisions. Chapter 15 in the book and in this training module provides a long list of frequently asked questions on M&E.

The use of evidence and the possible impact of research are not uniformly distributed among all five stages. The greatest influence seems to be at the beginning (agenda-setting) and at the end (evaluation), although it is
possible to exert influence at each stage, which is the essence of effective context mapping.

The next chapter (Chapter 5) explains how we can integrate push and pull forces to leverage demand for research evidence.

**Chapter 5: Bringing in the Demand**  
**Towards a harmony of push and pull**

The Mexico City Summit of Health Ministers in 2004 recognized the need for partnerships in addressing the problem of “know-do gap” and affirmed that greater focus on “the demand side” would increase the influence of research on policy.

The Summit directed attention to “knowledge brokering” and “involving the potential users of research in setting research priorities.” However, the Summit offered no formula for this new approach and no solution for closing the “know-do gap.” No doubt, there must be a harmony between researchers’ efforts to push results to users, and the demand for such results.

Although researchers and policy makers are guided by the same ultimate values of improving wellbeing through solving problems, they often have different immediate approaches. According to Choi et al. (2005) “researchers search for truth by using a rational model…. Policy makers search for compromise, by using an intuitive model.”

Research and policy making can sometimes appear to be on opposite poles. It is important to create platforms for closing the gap. Knowledge translation builds the foundation for close relationships between researchers and research users. An important aspect is to get users to demand for relevant results or evidence that they need for their work. Personal contact between researchers and policy makers is crucial and is by far the best predictor of research processes influencing policy. It is useful to note the three main types of policy making and their use of demand (pull) approaches.

**The Three Broad Types of Policy-making: Legislative, Administrative, and Clinical.**

**Legislative policies** provide organizational codes that govern an overall (health) system and its services. Legislative decision makers tend to be non-
specialists and to focus on policy impacts. Election cycles play important roles in the formulation of legislative policies, as some legislators want to be seen as active and interested in the problems of their constituencies.

**Administrative policies** dictate how services are run and resourced. The decision makers tend to have strong specialist knowledge and may use evidence to assist in program planning. Common examples are permanent secretaries and directors in government ministries, and heads of parastatals.

**Clinical policies** centre on therapies and corresponding strategies. The emphasis here is often on results relating to safety, clinical effectiveness, cost effectiveness, and patient acceptance.

All three broad types of policy makers need evidence. But what does evidence really mean? It means one thing to researchers (what is proven to be true), quite another to lawyers (what is said to be true), and something completely different to decision-makers. Lomas et al. (2005) have identified three categories of evidence, which are context-free, context-sensitive, and colloquial evidence.

**Context-free Evidence** – refers to what works in general or knowledge about the overall potential of something. Medical effectiveness provides good examples.

**Context-sensitive Evidence** – refers to putting evidence into a particular operational setting. This can be thought of as the intersection of biomedicine and social science or of quantitative and qualitative evidence or where theory meets reality. Systematic reviews and other types of syntheses use both context-free and context-sensitive evidence.

**Colloquial Evidence** – is the third type and it refers to any kind of evidence that establishes a fact or gives reason for believing in something. Expert opinion is a good example of this.

When it comes to research evidence, decision-makers often use all three types, and look for:

**Credible and reliable** sources

**Quality** – jargon-free and transparent recommendations ranked in order of effectiveness
Cost effectiveness – based on cost analysis
Local, national, regional or global contexts
Timeliness
Connections to more information
Customization – evidence should be flexible so it can be used in different situations
Modes of delivery – electronic and hard copies
(Adapted from Dobbins et al. 2004.

The Policy Pie: Since evidence means different things to different stakeholders, and there are diverse sources of scientific evidence (which is only one ingredient in the total mix), we can conceive the policy environment as a pie of many parts that include the media, cultural beliefs, policy briefs, experience, expertise, values, habits and traditions, lobbyists, single studies, research syntheses, and systematic reviews, among others.

The environment is so fluid it is perhaps naïve to press for evidence-based policy or evidence-based culture. Power, uncertainty, and chance play some roles in the policy process. Here below is a graphic depiction of the myriad of forces that can influence policy making today.

Integrating Research and Policy
The research policy corridor requires close collaboration between researchers and policy makers in meaningful linkage and exchange efforts to bring in the demand. Important variable to consider include how, when, and why decision and policy makers can be involved in the research process. Strong linkage and exchange strategies may include:

Conceptualization Stage – of holding priority-setting exercises that can translate priority issues into priority research questions.

Production Stage – of designing collaborative research projects in a true cooperative spirit.

Dissemination Stage – of creating knowledge translation strategies to go beyond mere syntheses and get into precise road-maps that lead from results to practice or policies.

Utilization Stage – of creating knowledge systems that can use, re-use and demand practical applications of results in problem solving.
Stewardship – which involves inviting decision makers in the governance of research processes.

Funding – which involves inviting decision makers to contribute financially to research projects.

It is useful to conduct correct mapping of the environment (context mapping) for successful linkage, as wrong partnerships are likely to lead to waste of resources and dysfunctional results. Successful linkages can be helped by two approaches of knowledge brokering and knowledge translation.

Two Approaches: Knowledge Brokering and Knowledge Translation Platforms.

Knowledge Brokering is playing the role of an intermediary between the two worlds of research and policy. This can be done by an individual or an institution. The primary task of the broker is to network through mediation and communication. Additionally, the broker can engage in:

- Research synthesis
- Partnership creation and nurturing
- Access facilitation
- Meetings

Knowledge Translation Platforms (KTPs) are special institutions which are committed to the arts of knowledge brokering. They aim to nurture and formalize the spirit of linkage and exchange, and exist to serve researchers, decision-makers, and other research users such as practitioners, journalists, and members of civil society organizations. A good example of a KTP is the Regional East African Community Health Policy Initiative (REACH-Policy), which is based in Kampala, Uganda.

Conclusion: Bringing in the demand for evidence is still far from an exact art or science, and not surprisingly, much valuable research evidence remains under-used or un-used because of weak demand by policy and decision makers. In our common situation, where many researchers do not understand or practice KT, demand (pull) is more important than supply (push). There are many approaches that can help improve the pull in the harmony of supply and demand.
Having covered the concept and the audience, the next section (Section C) deals with the message.

SECTION C. THE MESSAGE.

This section has only one chapter which explains communication messages from the point of view of strategy. Message is not only what is said, but also how it is said and in what medium. Messages and media are so closely linked Canadian iconoclast Marshall McLuhan came up with the aphorism that “the medium is the message.” Strategy is the heart of communication, and a communication strategy is invaluable in research dissemination.

Chapter 6: Communication Strategy.

A communication strategy is the making and implementation of a cohesive plan to deliver specific information to a specific audience for a specific reason within a limited time frame and with finite resources. Creating awareness may not be sufficient to achieve our objectives. The information must not only reach the audience but also elicit the desired results which may include capturing their interest, penetrating their thinking, and inspiring them to action. An effective message leads to action, which brings the desired result.

Essential Elements:
The building blocks in designing a communication strategy vary from one situation to another, but will usually include most of these steps:

Review: What is the situation? An audit can be simple or sophisticated but should assess past performance and current perceptions, usually through internal brainstorming or external research.

Objective: What do we want to achieve? All strategies must start with a clear understanding of the objectives or the reasons for communicating.

Audience: Who is the key audience? Are there others? What information do they need to act upon our message? Our communication objectives determine which audiences we need to reach.
**Message:** What is the message? Do we have one message for multiple audiences or multiple messages for multiple audiences? Common principles to consider may include Inform, Guide, and Motivate (IGM); aim for Attention, Interest, Desire, and Action (AIDA); and target impact which is a product of Visibility, Clarity, Relevance an Practicality.

**Basket (Tools and Products):** What kinds of communication “products” best deliver our message? These may include face-to-face meetings, phone calls, seminars, workshops, focus groups, conferences, and multi-stakeholder for a, which can in turn be used to create products like a policy brief.

**Channels:** What channels will we use? Having the right audience, and the right messages, and the right products is one thing, and delivering them through the right channels is another thing.

**Resources:** What budget provisions do we need? The potential cost of effective communication is open ended. Communication programs are not cheap.

**Timing (Events, Opportunities, Planning):** What is our timeline? There are internal and external deadlines to meet. Timing also implies planning to have phases or stages in the implementation instead of overloading one segment. It also involves taking advantage of opportunities for synergy.

**Brand:** Are all our products “on brand”? The logos and products of global brands give us an association of status, quality, and size. Our brand represents everything we do, so everything we do must reflect the brand.

**Feedback (Evaluative Thinking):** How can we assess our performance? How will we know when our communication strategy is successful? What will have changed? How can we assess whether we used the right tools, were on budget and on time, and had any influence?

**Conclusion:** Knowledge translation requires a communication strategy that sets out the objectives, identifies the audiences …. and evaluates the performance at the end.

The next section (Section D) explains the medium in three chapters that treat print, multimedia, and social/popular media.
SECTION D: THE MEDIUM
Print, multimedia and social media

This section explains the media (channels or vehicles) for transmitting the message to the right audience. A good message to the right audience through the wrong media is a futile effort. This section has three chapters: the print media, multimedia, and social/popular media.

Chapter 7: Print Media

Despite a plethora of options in modern communications technology, print remains a very powerful and important medium. While “push” strategies such as journal publications certainly have their uses, they also have limited influence on the decision-making process. The value of the print media rises tremendously when used in conjunction with “pull” or “linkage and exchange” strategies.

The print media present seven common tools which can be put to effective use before, during and after a project in order to optimize its reach and impact. These are peer-reviewed articles, newspaper articles, press releases, policy briefs, newsletters, brochures, and cartoons – all of which are useable at various stages of the research cycle. Each has pros and cons for capturing messages and reaching audiences.

Articles in scientific journals are often the litmus test of a researcher’s success, and thus they get considerably more attention in research organizations and academic institutions than the other tools. When our goal is to influence or change policy, this tool is woefully inadequate. Many non-scholars know nearly nothing about articles in scientific journals.

Newspaper articles and editorials are an obvious choice when a research message is aimed for the general public. Newspapers are powerful allies, but they can be terrible enemies too. Writing news and feature articles requires skills and talent.

Press (or news) releases are an important tool for getting stories into the media, especially if they are well written and better still customized for each recipient. Some of the best press releases come from comprehensive fact sheets. Press releases must be customized to increase their chances of use by
journalists, many of who appreciate exclusives. Some people prefer the term news release to underscore the need to use this tool only when we have news to share.

**Policy briefs** communicate directly with research users such as government officials, bureaucrats, politicians, development practitioners, donors, program implementers and more. The characteristics of the audience determine the format, content, and style of the brief.

**Newsletters** can be tailored for internal or external audience and are designed to inform or motivate staff, increase the visibility of an organization, and achieve special communication objectives. In this age of e-communication, many newsletters are circulated only electronically, giving rise to e-zines. These have advantages of global reach, instant circulation, and feedback from readers.

**Brochures and leaflets** are similar to newsletters but are ideal for presenting a single product, service or issue in one cover-to-cover summary.

**Cartoons and images** illustrate the saying that a picture is worth a thousand words. Pictures with text are known to be markedly more effective in increasing attention to and recall of information than when only text is used.

In this age of new media, the challenge is to expand the scope of each print tool to make it more suitable for multimedia applications, which is the topic of the next chapter.

**Chapter 8: Multimedia**

Media audiences hardly use only one medium and therefore the best media plan often involves recourse to more than one channel. The various channels are video (short films or video clips), radio spots (including podcasts), the Internet (including social networking, web sites, and blogs), oral presentations, poster presentations, and conference presentations.

**Video** is an attractive communication method but should be chosen according to the goals of the project and the characteristics of the audience. Short films and video clips can bring a story to life in a way that print cannot.
Radio spots are short commercial slots between major programs, which are purchased directly from the broadcasting station or indirectly through an agency. A podcast is a digital audio (or video) file that can be downloaded from the Internet and listened to or watched.

The Internet: social networking, websites and blogs - all enable and extend social networking in ways previously unimaginable. The Internet has expanded beyond e-mail to include interactive web sites, blogs, and social networking tools. Facebook, Twitter, and Youtube all useful tools for communicating research results, with varying degrees of effectiveness depending on the media use habits of the audience.

Oral presentations often involve making speeches, and the audience could range from one person to millions of listeners. The use of supporting technology is becoming ever more important. Four facts to keep in view are:

Fact One: Read the audience’s attention. The average adult attention span is 20 minutes.

Fact Two: Do not tell everything. Select the most salient aspects.

Fact Three: Brevity is the soul of wit.

Fact Four: There is competition; do not give the audience reason to check out.

Speech Making Skills: Researchers need to understand and use speech making skills to their advantage. A good model to learn and apply is the Three-Message Speech – which involves telling them, showing them, reminding them, and asking them. Structuring the approach yields this:

Tell them what the three messages are;
Show them those three messages in action with detail;
Remind them what the three messages were;
Ask them for their questions or concerns.

Poster presentations summarize selected works in easy, captivating nuggets on a poster which should be designed for maximum visual impact while providing sufficient information.
Conference presentations use varied approaches that reflect the traditions of disciplines and the purposes of the meetings. Ironically, many conferences do not yield optimal dividends because of the failure of organizers to produce better and more dynamic conference records through poor synthesis and rapporteuring.

Knowledge translation is best done through multiple media channels which are selected for their fit with the project objectives and the characteristics of the audience. An effective multimedia strategy may involve use of traditional media such as newspapers, radio, and television as well as new social media such as blogs, twitter, and Youtube. There is always room for creativity in media selection and the opportunity to take advantage of special events and opportunistic developments.

The next chapter explains the social/popular media, which are becoming are still attractive and can be integrated creatively with the new information technology. Storytelling, theater, dance and song are still fashionable today.

Chapter 9: Social/Popular Media

Often times, the audience may be better at repackaging the information for themselves and their peers. In some communities, storytelling, theater, dance and song for informational and educational purposes are widely used for different purposes.

Story telling is an ancient art which can still be applied in modern knowledge translation. It has been used to good effects in capturing tacit knowledge.

Theater and song provide powerful tools for entertainment, education, and social engagement, which can assist in influencing attitudes, behaviors, and policies. These are more appropriate in certain circumstances or contexts, and should not be over generalized.

SECTION E: THE TOOLBOX
Examples, templates and guides

This section has six chapters that explain communication strategy, the two-pager, the conference, tapping technology, word processing, and monitoring and evaluation.
Chapter 10: Communications Strategy
The Communications Strategy Template

As highlighted in Chapter 6, the 10 essential elements to address in developing communication strategies are:

1. Review – which addresses the question of how we have been communicating in the past.

2. Objectives – which are the SMART targets we have set to achieve with the available resources.

3. Audience – which outlines the people or organizations or groups we plan to reach with our evidence, noting what information they may need from us.

4. Message – which is the narrative or story we have on our work and evidence.

5. Basket – which shows the “products” we believe will best tell our story or capture the message.

6. Channels – provide us with the best media outlets for delivering the message and products.

7. Resources – address the questions of what financial, material, and human needs necessary to implement our dissemination plan.

8. Timing – shows what needs to be done when, where, by whom, with whom, and for what results.

9. Brand – directs us to pay attention to the need for all communication reflect us consistently.

10. Feedback – requires us to check how our communication has influenced the audience and in what areas we need to improve our performance.

For some examples of communication strategies, see the following three illustrations:
The IMF’s Communication Strategy. 2007. The strategy is well thought out and shows how communication can help an organization achieve its core goals. 


Africa Drive Program. 2006. Communication Strategy and Plan. This document shows a breakdown of the communication requirements and several tables show how to develop and pitch key messages. 
http://www.adp.org.za/Trust Meeting Documents/ADP Trust Meeting070906/Documents/ADP Constrat V01.doc

Chapter 11: The Two-Pager: Writing a Policy Brief

In research communication, we can say a lot in just two pages. Not surprisingly, many press releases, briefing notes, and policy briefs are only two pages long. In each case, the nature of the target audience defines the type of two-pager we would use.

**Press releases** are stories in simple language highlighting the significance of the research and the need for some action based on the findings. Direct quotations from researchers and other credible sources make for better press releases.

**Briefing Notes** provide more in-depth and scientific treatment of the issues, usually for an audience that already enjoys some familiarity with the problem. Think of this as an extended abstract for a journal article.

**Policy Briefs** outline the problem, its remedies, and how the research evidence contributes to the solution.

**Writing a Policy Brief:** A policy brief as a message from researchers to policy makers must be written with an eye on brevity and clarity. The structure is to frame a potential or current problem, show possible remedies in context, and make specific recommendations (sometimes with associated costs of each).
The first section outlines the problem.

The last section has the policies.

And the middle section bridges the two, with persuasion.

**Supporting a Policy Brief:**
A policy brief is an effective tool but it is not a stand-alone cure-all. It should be used in conjunction with any and often many other KT strategies and techniques. Lavis et al. (2005) suggest that a policy brief be framed with the 1:3:25 graded entry format, where:

1= a one-page summary of the argument for time-pressed policy makers;
3= a three-page executive summary or the policy brief proper
25= a twenty-five page scientific paper or synthesis for administrators or implementers who need more comprehensive knowledge.

The completed policy brief could be one page long, in which case it is a brief summary, but with all the essential elements, or it could be as long as 10 pages with multiple sub-sections and sub-headings. The title is important and deserves some attention to make sure it can attract attention and also reveal the core issue(s), and the conclusion must be concise but persuasive as it may be the last chance to convince the policy maker to use our research evidence. Footnotes and references are necessary to provide collateral evidence. Always end with information on who can be contacted for further information.

Policy briefs are such important tools in research communication it is a wonder that researchers do not learn how to write them in school. The best policy briefs often involve collaboration between researchers and communicators, as each group brings valuable skills (knowledge of the research done and good methods of communicating effectively) to the situation. Thankfully, there are many excellent policy briefs from reputable organizations that can serve as examples for novice writers. In addition to press releases, briefing notes, and policy briefs, researchers have to be familiar with making presentations at conferences and to policy makers. These are explained in the next chapter.

**Chapter 12: The Conference 2.0**
This chapter describes the uses of speech communication as a tool in research communication, paying particular attention to the strategies for effective conference presentations. Some of the principles will apply to presenting in small groups such as parliamentary committees or departments in government ministries. The essential elements are rehearsing, the actual delivery, and follow up.

**Oral Presentations**

Some golden rules for speech-making are: Rehearse thoroughly, preferably with a mock audience, to be completely familiar with the material and to comply with time limits.

Video-tape yourself, if possible, and review with a critical eye to know where to make changes.

Pay attention to timing, knowing that speed is a factor in comprehension. The rule is: Not too fast, but not too slow either.

Enlist an audience to watch the rehearsal and be open to its criticisms and suggestions for improvement.

Use real conditions by rehearsing the speech in the real venue, if possible. This is not always necessary or possible.

Get to know the presentation by using the same material so as to catch any problems with visual aids, bad spelling, or slides that are out of sequence.

**The Big Moment** – is when you make the actual delivery. Some tips: Short self introduction; never quit or get desperate or angry or rattled; start and end strong; use pauses; stand up; vary the pitch and tone of your voice, enunciate; face the audience and make eye contact; don’t read from a paper; don’t read the visual aids; do ‘read’ the audience, and respond to it – give it what it wants; respect time limits; add some flair, your audience wants to be wowed, not put to sleep; try for an unforgettable moment.

**The Follow-up.** Since questions are an essential part of any conference presentation, it is important to budget for a question period. Even when presenting to small groups such as parliamentary committees, one should
expect some questions, some of which can be friendly or hostile depending on the composition and disposition of the audience.

**The Technology Supporting the Presentation:** Oral presentations often become subordinate to the Powerpoint. Technology should not subsume substance. One slide takes about two minutes to deliver. Expect that technology may disappoint and thus plan for backups.

**Poster Presentations.** Many organizers provide instructions for preparing posters. Regardless, pay attention to design issues (font, white space, graphics, text, extraneous materials, reading direction, and handouts).

Proper is of communication technology is an important aspect of research communication. The next chapter explains the use of email, distribution lists, and the Internet.

**Chapter 13: Tapping Technology**

**Netiquette, browsers and distribution lists**

It is safe to say there is no research communication without technology, even if it is the most rudimentary method of scribbling research results on paper with a pencil. Today, advances in new information and communication technology make it imperative for researchers to know how to take advantage of the new developments such as email, distribution lists, and the Internet. Other tools are blogs, Twitter, Youtube and podcasts.

**Email** is now used by nearly everybody, but not everybody knows how to use it well. Some advice: Keep messages short; never write in all caps; always check “to”, “cc”, and “bcc” fields; subject line; use plain text; and say so if it is time sensitive.

**Electronic Distribution Lists** (Listservs) are useful for group communication.

**The Internet** now has many different ways of being accessed using browsers such as Internet Explorer, and Mozilla Firefox. It is such a valuable tool for sharing and receiving information we wonder how we could have operated without it.

The next chapter describes word processing and the creation of newsletters.
Chapter 14: Word Processing: Creating a Newsletter

Such documents like brochures and newsletters can be conveniently produced using desk top publishing programs. But always pay attention to:

The audience – dictates every element of the newsletter

The design – will reflect what the audience wants to read

The logo and title (or masthead) must capture the audience’s attention at a glance.

Reverse engineering: Samples of good newsletters can serve as models for us if we take the final product and then work backwards to see how the parts created the end result.

The importance of trial and error. Keep trying. Keep experimenting and testing. And keep saving your work.

Chapter 15: Monitoring & Evaluation – Frequently Asked Questions

What is the difference between “monitoring” and “evaluation”? Monitoring is on-going “observation” simply measuring performance against pre-set levels. It is usually carried out internally. Evaluation is a more systematic and deeper assessment typically carried out at the end of a project cycle. They examine not only what happened, but also how and why it happened that way, and what might be done to improve performance.

What are the usual steps in carrying out an evaluation? The seven steps are:
Define the purpose and parameters of the evaluation;
Identify key stakeholders;
Define the evaluation questions;
Select appropriate methods;
Collect data;
Analyze and interpret data;
Use and communicate results.
**What are evaluation criteria?** They help us answer such questions as: How do we know what “good” or “bad” is? How do we recognize “success”? The bigger question is “exactly what is it we’re evaluating? What do we want to find out? Against what criteria should we assess our project? How do we determine whether resources have been properly used?” Five good criteria provided by the OECD’s Development Assistance Committee are: effectiveness, impact, relevance, sustainability, and efficiency.

**What is the difference between a formative and a summative evaluation?** Formative (or interim) evaluation is conducted while activities are still underway, while summative evaluation is conducted at the end.

**What is a process evaluation?** Progress evaluation? Impact evaluation? **Process evaluation** focuses on the ways in which we planned and carried out the activities in addition to studying the outputs and other relevant results. **Progress evaluation** assesses the extent to which a project is meeting its goals, measured against the benchmarks we established. **Impact evaluation** assesses the total effects of the project.

**What is baseline data?** It is data derived from a baseline study showing a picture of the situation before the implementation of the project activities.

**How can we determine causality?** Determining causality requires us to establish that the changes would not have taken place if the project had not been undertaken. In many cases, it is difficult to establish that our projects or activities were solely responsible for the changes we record.

**Which evaluation approach is right for my project?** There is usually no set rule. It depends.

**What is a Logical Framework Approach?** A logframe is an application of a results-based monitoring to assess relationships that link causes and effects, as well as inputs, processes, outputs, outcomes and impacts. The framework can be very helpful in formative and/or progress evaluations, especially where we need to make improvements and rectify shortcomings.

**What are Modular Matrices?** They are self-assessment tools for showing simplified at-a-glance displays of juxtapositions of elements that should or should not be aligned.
What is a RAPID Outcome Assessment (ROA)? It is the quick method of tracking back from policy changes to identify the major contributory actors, events, and influences to which we can attribute the outcome.

What is Outcome Mapping? This was developed by IDRC’s Evaluation Unit as an alternative approach to evaluation. Knowing that causality is difficult to establish, the idea is to identify outcomes which can be defined as changes in the behavior, relationships, activities, or actions of the people, groups, and organizations that work directly with the program.

How can I blend Outcome Mapping and a Logical Framework Approach? There is no simple formula for this. The best approach is to try to understand the different kinds of information, their advantages and disadvantages, and then find ways to put them to best uses, in the context.

Where can I get more information on M&E? There are many different sources. IDRC and DfID are popular organizations that are committed to research communication as well as monitoring and evaluation.

This is the end of the Training Module. Please provide some comments in the next section to guide us in improving the final printed version which will be made available to researchers who are interested in understanding how to share their new knowledge with relevant publics of policy makers, journalists, service providers, and the general public, as the case may be.

=END=