

**Knowledge Transfer and Exchange  
Among the Nonprofit Organizations  
Funded by  
the Knowledge Development Centre and  
the Community Support Centre, 2002-2005**

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## **Executive Summary**

Nowadays, it is generally recognized that merely developing knowledge is not enough; there must also be mechanisms to let that knowledge move among organizations and individuals who can interpret it and put it to use. This report explores the knowledge transfer and exchange practices of nonprofit organizations in Canada and the effectiveness of these practices.

Knowledge transfer and exchange is defined as *a set of activities and approaches that are undertaken to move knowledge among those who need that knowledge or have an interest in it*. This movement may involve a one-way flow of knowledge from the developer to practitioners (i.e., knowledge transfer) or a two-way flow among developers and practitioners, recognizing that knowledge is not the sole domain of any one actor in a system (i.e., knowledge exchange).

Between 2002 and 2007, a tremendous amount of knowledge on volunteerism was developed through the funding programs of two centres of the Canada Volunteerism Initiative (CVI): the Knowledge Development Centre (KDC) and the Community Support Centre (CSC). Together, these two centres funded 111 projects and developed more than 120 information resources and products. This report outlines the findings of a study undertaken by Imagine Canada to examine the efforts that these KDC- and CSC-funded organizations made to promote, transfer, exchange, and use the knowledge they developed and to assess the results of these efforts.

This study examines the knowledge transfer and exchange activities of 90 organizations that were funded between November 2002 and March 2006. The first phase of the study consisted of an online survey that gathered initial information about the knowledge transfer and exchange activities of these organizations. The second phase consisted of interviews with 20 organizations whose responses to the survey indicated that they had carried out significant knowledge transfer and exchange activities.

The nonprofit organizations that participated in our research had carried out various types of activities to transfer, exchange, or just distribute their knowledge. These activities were particularly different in terms of giving weight to one of the key elements of knowledge transfer and exchange that has been extensively discussed in the literature: audience.<sup>1</sup> In this report, we employed this element to categorize the activities that organizations conducted. For example, we looked at the aspects such as having targeted audience, defining audience, or the level of contact with audience. Therefore, we grouped the organizations' activities in three: Group One activities are to create conditions for knowledge transfer and exchange such as promotion, distribution and development of information resources and products; Group Two activities are about knowledge transfer and include presentations and publications; and Group Three activities focus on knowledge exchange and include workshops, discussion meetings, and training sessions.

Overall, the organizations that participated in our study were more likely to have carried out activities that created the conditions for knowledge transfer and exchange and that transferred knowledge than they were to have carried out activities that allowed for the exchange of knowledge.

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<sup>1</sup> See F., Zarinpoush, S., Von Sychowski, & J. Sperling (2007), *Effective Knowledge Transfer and Exchange: A Framework*, for more details.

In each group of activities, some methods were more common than others. Most organizations developed multiple resources to reach a large number of potential users. Use of local media for promotion and making information resources and products available at various events for distribution were the most common methods. The least common methods for promotion and distribution were webcast, word of mouth, and developing promotional items. To transfer knowledge, stand-alone presentations occurred more frequently than presentations as part of other events. Webinar was the least reported method. For knowledge exchange, workshop was the most reported method and on-site visits and mentoring were the least common methods.

When investigating the effectiveness of these activities, organizations pointed to some tips that can lead other organizations to effective knowledge transfer and exchange. Tips included: packaging knowledge in different format; preparing multiple information resources; having both paper and electronic versions of information resources and products. Also, the use of local media for promotion and use of other events for distribution could be considered as they are easy to do and inexpensive. Most of the tips for effective knowledge transfer were about knowing the audience: understanding the audience's level, language and expectations are crucial. The method of transfer should also be easily accessible and familiar to audience and encourage their participation.

The tips on conducting knowledge exchange were mainly about creating an environment conducive to audience engagement. Facilitating audience participation in activities and reflection on their knowledge and experiences, providing opportunities for them to be heard, and exposing them to various perspectives and real-life experience were some tips for effective knowledge exchange.

Organizations were most likely to report immediate outcomes that they observed at the knowledge transfer or exchange activities or shortly thereafter. The immediate outcomes included increased awareness, changed motivations and attitudes, and increased demand for knowledge. The outcomes that took longer to appear were increased volunteerism and improved practices.

The findings of our study suggest that, once knowledge is developed, there are great opportunities to use it inside the organization to improve practices. The organizations were able to list a variety of ways they used the knowledge they gained. Although organizations provided some examples of external use of knowledge and its effects, the information was limited and anecdotal. Gathering informal feedback was commonly reported. Indeed, lack of follow-up mechanisms to systematically gather information and measure the impact of their work was clearly a challenge that the organizations faced when doing knowledge transfer and exchange.

Lack of time and longer financial support to better plan and perform activities are other barriers of knowledge transfer and exchange, which limited organizations to properly train their audience to apply the newly developed knowledge. These barriers particularly affect activities related to knowledge exchange, since exchanging knowledge occurs through a process and requires follow-up mechanisms, time, and financial support to communicate with the audience, gather feedback, train the users, and observe changes in practices.

Our study helped us to better understand the nature and effectiveness of the knowledge transfer and exchange activities that are being carried out in the nonprofit sector. We conclude this report by presenting five case studies, each of which highlights some key elements of successful knowledge transfer and exchange. These include: making connections (Case One), having multiple resources and products to reach a wide variety of audiences (Case Two), knowing audience and planning accordingly (Case Three), how to use knowledge to expand volunteerism (Case Four), and the importance of feedback (Case Five).

## Introduction

Knowledge transfer and exchange is getting more and more attention in business, government, and the nonprofit sector. It is generally recognized that merely developing or gaining knowledge is not enough; there must also be mechanisms to let that knowledge move among organizations and individuals who can then interpret it and put it to use. But what are Canadian nonprofit organizations doing to address knowledge transfer and exchange?

Between 2002 and 2007, a tremendous amount of knowledge on volunteerism was developed through the funding programs of two centres of the Canada Volunteerism Initiative (CVI): the Knowledge Development Centre (KDC) and the Community Support Centre (CSC).<sup>2</sup> These two centres were created to build on the body of knowledge on volunteers and volunteerism in Canada and to develop and test innovative methods for sustaining volunteerism. KDC and CSC were also charged with promoting the effective transfer of this newly developed knowledge to voluntary organizations to assist them with their work and to enrich the experiences of volunteers in Canada.

This report presents the findings from a study undertaken by Imagine Canada to understand the efforts made by KDC- and CSC-funded organizations to transfer, exchange and use their newly developed knowledge and to assess the results of these efforts. The report also explores the common knowledge transfer and exchange practices used by these organizations.

For the purposes of our research, we define knowledge transfer and exchange as *a set of activities and approaches that are undertaken to move knowledge among those who need that knowledge or have an interest in it*. This movement may take two approaches. It may involve primarily a one-way flow of knowledge from the knowledge developer to practitioners (i.e., knowledge transfer), or can involve a two-way flow among knowledge developers and practitioners (i.e., knowledge exchange) recognizing that knowledge is not the sole domain of any one actor in a system.

Altogether, KDC and CSC funded 111 projects. As funding agencies, the centres reviewed the processes that organizations took to develop knowledge and their information resources. Organizations funded by KDC were required to prepare a report and one or two fact sheets, and organizations funded by CSC were required to submit a final comprehensive report.

The funded agencies also took part in distributing the information resources that organizations developed. KDC funded 62<sup>3</sup> research projects and published 102 information resources and products, all of which are available in French and English and in both print and electronic formats (see <http://www.kdc-cdc.ca>). CSC funded 49 pilot and demonstration projects and selected about 20 products to be distributed electronically in English and French (see <http://www.volunteer.ca/resource>).

Our study examined the knowledge transfer and exchange activities of KDC- and CSC-funded organizations to answer the following questions:

- What types of knowledge transfer and exchange activities were being carried out by the nonprofit organizations?

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<sup>2</sup> CSC was operated by Volunteer Canada in partnership with Imagine Canada, and KDC was operated by Imagine Canada.

<sup>3</sup> Including eleven projects funded in 2006-2007.



- What tips and advice would these organizations offer, which could increase the effectiveness of knowledge transfer and exchange activities?
- What types of outcomes did these organizations perceive, which could be expected from these activities?
- What challenges did these organizations face, which may be faced by other organizations as well?

In this report, we first explain the activities that organizations carried out to create conditions for the transfer and exchange of the knowledge they had developed, transfer that knowledge, and/or exchange that knowledge. We describe how these activities were carried out and offer some tips for doing them effectively. Next, we identify the outcomes of these activities as well as the challenges and barriers to knowledge transfer and exchange that these organizations experienced. Finally, we offer some concluding remarks followed by five case studies that highlight some of the key elements of successful knowledge transfer and exchange in the nonprofit sector.

## **Methodology**

Our study set out to examine the knowledge transfer and exchange activities carried out by organizations that were funded by KDC<sup>4</sup> and CSC<sup>5</sup> between November 2002 and March 2006.

We undertook the study in two phases. Phase I consisted of an online survey to gather initial information, and Phase II involved 20 interviews with organizations whose responses to the survey indicated they had undertaken significant knowledge transfer and exchange.

A total of 90 organizations received funding from KDC and CSC. Of these, we excluded 20 organizations that had not produced an information resource or product, whose phone number and address were no longer in service, or that did not have any staff to respond to our survey. We contacted the remaining 70 organizations by e-mail.

### **Phase I: The online survey**

The purpose of the online survey was to gather some basic information about the knowledge transfer and exchange activities of KDC- and CSC-funded organizations and, from this, to select 20 organizations for interviews. The survey asked about activities carried out to promote, distribute, transfer, and exchange the knowledge that these organizations had developed through their funded projects.

The survey was carried out from November 7 to November 13, 2006. It contained 23 questions and took approximately 10 minutes to complete (see Appendix A). It was available in English and French. In total, 40 surveys were completed (see Table 1), for a response rate of 57%. Data were entered into SPSS software for analysis.

### **Phase II: The interviews**

The purpose of the interviews was to gather in-depth information about the knowledge transfer and exchange activities of KDC- and CSC-funded organizations, the results of those activities, and the challenges the organizations faced as they carried out these activities. For these interviews, we selected 20 organizations that had completed the survey and reported significant knowledge transfer and exchange activities.

During interviews, we explored organizations' experiences with and opinions about knowledge transfer and exchange activities, the perceived effectiveness of those activities, the perceived outcomes, and the challenges these organizations faced (see Appendix B).

The interviews were conducted between November 20 and December 1, 2006. Each interview was one hour long, on average. Eighteen interviews were conducted in English and two in French. Ten of the organizations had been funded by CSC, nine had been funded by KDC, and one had received funding from both. Five organizations were affiliated with a school or post-secondary institution and the remaining were based in the communities. All interviews were audio recorded and transcribed. NVivo was used for data analyses.

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<sup>4</sup> KDC funded 62 projects but this study considered 47 projects funded between 2002 and 2005. Of these 47 projects, 7 were funded in 2002, 12 in 2003, 11 in 2004, and 17 in 2005. Another 11 projects were funded in 2006-2007 and they were not complete at the time this study was done. KDC also funded four national projects internally, conducted by Imagine Canada, which were also excluded from this study.

<sup>5</sup> Of the 49 projects funded by CSC, 19 were funded in 2003, 15 in 2004, and 15 in 2005. CSC did not fund any projects in 2002 or 2006.

**Table 1: Participants by funder and funding year**

Year Funded	CSC Project	KDC Project	Total survey respondents	# Interviewed
2002	0	1	1	1
2003	7	4	11	5
2004	7	5	12	7
2005	8	8	16	8
<b>Total</b>	<b>22</b>	<b>18</b>	<b>40</b>	<b>20</b>

## Findings

This report describes the knowledge transfer and exchange activities carried out by 40 nonprofit organizations, the outcomes of those activities, and the barriers these organizations encountered. It also offers tips and advice that may be of use to others who are involved in knowledge transfer and exchange.

### ***Knowledge Transfer and Exchange Activities***

The nonprofit organizations that participated in our research had carried out various types of activities to transfer, exchange, or just distribute their knowledge. These activities were particularly different in terms of giving weight to one of the key elements of knowledge transfer and exchange that has been extensively discussed in the literature: audience.<sup>6</sup> In this report, we employed this element to categorize the activities that organizations conducted. For example, we looked at the aspects such as having targeted audience, defining audience, or the level of contact with audience. Therefore, we grouped the organizations' activities in three:

- Group One – activities that create conditions for knowledge transfer and exchange, i.e., activities related to the development of information resources and those that promote and distribute information resources and products and raise awareness of the newly developed knowledge;
- Group Two – knowledge transfer activities, i.e., activities that result in a one-way flow of knowledge from the knowledge developer to the intended audience through such means as presentations and publications; and
- Group Three – knowledge exchange activities, i.e., activities that result in a two-way flow of knowledge between the knowledge developer and the intended audience, providing engagement and learning opportunities for both parties through such means as workshops, discussion meetings, and training sessions.

### **Creating the Conditions for Knowledge Transfer and Exchange**

Organizations reported some activities that create the conditions for effective knowledge transfer and exchange. These activities are resource development, promotion and distribution.

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<sup>6</sup> See F., Zarinpoush, S., Von Sychowski, & J. Sperling (2007), *Effective Knowledge Transfer and Exchange: A Framework*, for more details.

## Activities

**Development of information resources:** Organizations prepared various types of information resources or products to be distributed or used for knowledge transfer and exchange. The most common information resources produced were research reports, reported by 63% of organizations (see Table 2). The next most common resources were fact sheets (48%) and surveys or questionnaires (48%). This is perhaps not surprising given that one of the funding bodies, KDC, required funded organizations to produce a research report and one or two fact sheets.

Research reports, however, were not the only resources or products. Among the 24 organizations that said they developed reports, 92% had also developed other information resources such as fact sheets (54%), manuals (46%), and workshop materials (46%). Also, among all organizations, 92% prepared multiple information resources.

Information collected through our interviews suggests that having more than one type of information resource or product can broaden the audience for newly developed knowledge<sup>7</sup>:

*“...having the research itself as a resource and having the DVD as a resource really complement each other. The research gives validity to what we’re doing to a group of administrators, academics, and government representatives in a way the DVD doesn’t. The DVD works as a how-to for other communities [...], it speaks to them in a way that the research wouldn’t.”*

Another organization said how multiple resources completed their transfer knowledge activity:

*They [audience] saw the fact sheet as a way to spread the basic information, and the manual as a more in-depth yet manageable version to follow up with.*

The least common types of information resource or product were databases or maps (5%) and videos or software (3%).

**Table 2: Types of information resources or products produced by participated organizations**

Information Resources and Products	Percentage
Research report	63
Fact sheet	48
Survey or questionnaire	48
Form and screening tool	25
Training material	25
Manual, handbook, or guide	24
Workshop material	14
Tool kit	13
Website or telephone line	13
Tip sheet	8
Database or map	5
Video or software	3

Note: Percentages do not add to 100 because multiple products were reported by many projects.

<sup>7</sup> See Case Two: “Package Knowledge in Different Format” for the full story.

**Promotion:** Promotion lets people know about the newly created information resources or products and how they can be accessed. Most (92%) of the organizations that participated in our study used various methods to promote their knowledge and its related products.

Media releases were the most common method used to promote information resources; 40% of respondents reported that they had used this method (see Table 3). One organization reported that a media release generated more inquiries than any other method of promotion<sup>8</sup>:

*“We printed articles in our bilingual community newsletter, in local Chinese newspapers, and talked on the radio to promote our new manual and our training. We found these are the most effective means to promote because they are free and people can access this very easily... We received inquiries from people who told us they had never heard about resources on domestic violence and also got calls from people who needed interpreters.”*

Other common promotion methods were brochures or flyers (used by 33% of respondents), e-mail or websites (25%), and promoting information resources at events such as conferences and seminars (20%). The least common methods were webcasts (8%), word of mouth (8%), and promotional items such as note-cards, t-shirts, or bottles (5%).

**Table 3: Methods used to promote information resources or products**

Promotion Methods	% of Respondents
Media release	40
Brochures or flyers	33
E-mail or website	25
Promotion in an event	20
Workshop	18
E-bulletin or newsletter	10
Webcast	8
Word of mouth	8
Promotional items, e.g., note-cards, t-shirts, bottles	5

Note: Percentages do not add to 100 because some organizations reported using more than one method.

**Distribution:** Distribution gets the newly created information resources or products into the hands of others. Doing some forms of distribution and making information accessible is very common and many may consider this to be the final step of a research project rather than the first step of knowledge transfer. Almost all (95%) of the organizations that participated in our study had some mechanisms to distribute their information resources.

The most common distribution method, reported by 73% of respondents, was to make their information resources available at conferences, training sessions, and workshops (see Table 4). This may be because this method is easy and inexpensive and requires very little effort. More than half

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<sup>8</sup> See Case Four: “Use Knowledge to Expand Volunteerism” for the full story.

used online distribution methods such as e-mail (58%) and websites (55%), and less than half (48%) used the traditional method of mail-outs.

**Table 4: Methods of distributing information resources or products**

Distribution Methods	% of Respondents
Distribution in events	73
E-mail	58
Website	55
Mail-outs	48
Telephone line	13
Workshop	10
Teaching course	8
Presentation	8

Two of the top four distribution methods (e-mail and website) require electronic versions of the information resources or products, and two (distribution at events and mail-outs) require paper versions. This suggests that it is still necessary to produce both electronic and paper versions of resources. Information emerged during interviews further support this idea. One reason for this is lack of access to technology. One organization noted:

*“There’s such interest in the original copy of the fact sheet and the manual rather than the electronic version ... We’re talking about reaching rural families who may not have access to technology to download a copy of even read it online.”*

Another organization highlighted the various ways that paper versions can be used:

*“We submitted a set to each executive and the stakeholders but they have requested additional copies because they want to have conversations with people within their district or within their community groups. They wanted additional copies far beyond what we thought... there is an electronic copy that they can have but we’re meeting with resistance. People are just not comfortable. They want the original copy in their hands.”*

### ***Tips for resource development, promotion and distribution***

- Package knowledge in different format and prepare multiple information resources to reach different audiences.
- Prepare both paper and electronic versions of information resources and products to respond to the needs of all potential users.
- Use local media to promote information resources and products; this can be a low-cost way to reach a large and diversified audience.
- An easy and inexpensive way to distribute information products and resources is to make them available at events organized by your organization and, where possible, at events, conferences, and workshops organized by others.

## **Knowledge Transfer**

The majority (95%) of organizations that participated in our research engaged in activities to transfer their newly developed knowledge to their various audiences. From two activities identified, one was either direct (i.e., face-to-face presentations) and one was indirect (i.e., publication of information in a local newspaper or website or in a peer-reviewed journal).

### ***Activities***

**Presentation:** Presentations were the most common direct form of knowledge transfer. It either occurred as a stand-alone event (70%) or as part of other events such as workshops (55%), discussion meetings (48%), or training sessions (38%). The least common direct ways of presenting information were to have it as part of focus groups, information kiosks, television, radio, and theatre (8) and through webinar (3%; Table 5).

During interviews, organizations highlighted the importance of audience in knowledge transfer. Some explained how they adjusted their presentations to their audience. One organization used short skits to get information across to its audience:

*“When we did the presentations to vocational training services for adults with intellectual disabilities, we had a couple of [our] members do two little skits based on stories of volunteering that people with intellectual disabilities had told [during the research]. Participants were actually thinking that maybe they’d like to volunteer... they realized that they could.”*

Another organization pointed to the use of plain language:

*“Just from doing our work in the community, we know the importance of using plain language, of ensuring that the information we’re giving is understandable, because we have pretty low literacy in the communities... we find that people are far more comfortable sitting with us as well when we’re not speaking above them.”*

Some organizations perceived that presenting information in discussion meetings or through informal conversations could increase understanding:

*“... When you’re engaged in a conversation, one question leads to another and it helps to clarify understanding.”*

*“Wherever I have those connections, I make it a point, if it’s relevant, to bring forward not only [the knowledge] but the materials and the supports for people to use [the knowledge].”*

Organizations also indicated the importance of meeting expectations of their audience. One organization observed that its presentation at a conference failed because they did not know what the audience wanted:

*“The conference was disappointing because it was not a good match. The organizers had heard about our research and wanted to make the link between health and safety... but participants’ mindsets at the conference were mostly on health, they weren’t completely sold on the idea. If I were to do that again, I would make sure that the conference was more in line with the topic of the research, or even present the information a little differently.”*

Another organization received positive feedback because it delivered exactly what the audience wanted:

*“The audience at the conference was other researchers from across Canada [...] we received very good feedback. A lot of the researchers feel disconnected from what happens*

*on the front lines at the community level, and they don't often see the work they do being applied, so people were really excited to hear about [the funded project] and working so closely with people in the community."*

**Publication:** More than four in ten (43%) organizations published an article about their newly developed knowledge in a local newspaper or on a website; 20% published an article in a peer-reviewed publication.

Organizations chose the publications that were appropriate and accessible to their audience. One organization chose a newspaper article to reach its audience:

*"We published a four-page insert in a community paper that is primarily for the residents, but it also goes out to the local city councillor and local members of legislature."*

**Table 5: Methods used to transfer knowledge**

Knowledge Transfer Methods	% of Respondents
<b>Presentation</b>	
Stand-alone presentation	70
Workshop presentation	55
Presentation as part of discussion meeting	38
Presentation as part of training session or course	38
Presentation in focus groups, information kiosks, television, radio, theatre	8
Webinar	3
<b>Publication</b>	
Articles in local newspaper or website	43
Peer-reviewed publication	20

### Tips for knowledge transfer

- **Keep your audience in mind:** when deciding on the most appropriate format for transferring knowledge, think about those who would use it.
- **Use language that your audience will understand:** For example, don't use academic or overly complex language to reach a general audience.
- **Meet the expectations of your audience:** Understand what information your audience needs and wants and then deliver that information.
- **Encourage audience participation:** Audiences learn more if they can participate in some way.
- **Choose appropriate methods:** think about means and methods that are easily accessible and familiar to your audience.



## **Knowledge Exchange**

Knowledge exchange requires a setting in which a two-way flow of information leads to a dialogue between parties involved and creates learning opportunities for all. Near one quarter (23%) of the organizations that participated in our research reported that they did not carry out any knowledge exchange activities. This may reflect the challenges and barriers that organizations perceived and will be explained later. The remaining organizations (77%) reported four common methods: workshops, discussion meetings, training sessions and conferences or seminars.

## **Activities**

More than half (53%) of respondents performed workshops to exchange their knowledge, 35% did discussion meetings; 28% did training sessions or courses, and conferences or seminars were used by 25% (see Table 6). The least common methods were mentoring (8%) and on-site visits (8%).

Organizations noted that workshops were an effective way to exchange information, particularly when they offer “*content in a way that is engaging*” and facilitate “*group interaction around the content.*” Interaction could benefit both the knowledge developer and the audience. An organization explained it this way:

*“Participants validated the information, talked about some of their experiences, and even identified a barrier that wasn’t in the research, so the whole group learned some concrete ways to make the volunteer experience better for them.”*

One organization encouraged its workshop participants to reflect on their own experience and use their imaginations:

*“I had people imagine themselves in a situation where they were planning a stewardship volunteer event or program, and then in small groups do some brainstorming about very specific tactics for engaging families. Things that came out of the research became more real when people were able to think about them with respect to their own issues [...] it got people thinking about how they could apply some of the results of the research in their own organizations.”*

In a discussion meeting, an organization explained how they prepared a situation in which different people came and listened to each other:

*“Two generations don’t often have an opportunity to sit together with open-ended discussions on a particular topic [...] so this was an opportunity to bring their ideas. Organizations talked about their issues, recruiting young people, and young people talked about their experiences [...] so it was a learning experience for everyone in the room.”*

In training sessions, when various perspectives were presented, the organization’s program had a better outreach:

*“At the end of each training session, we brought in other service providers like the police, the City of Calgary [...] to introduce our interpreters and let them talk about their experiences, so that these agencies learn about the significance of interpretation and how our programs can reach different groups.”*

Making a connection with real life was also used in a training course:

*“... students go out into the community and work with organizations to carry out projects for them, and then write a reflective paper on the critical question: what would happen if this organization did not exist?”*

Holding on-site visits was a successful way for an organization to observe the effects of their knowledge transfer and exchange:

*“It’s really through these site visits with six or seven pilot groups that we’ve observed the ways they put into action some of our tools and recommendations and how their methods of working with youth have changed. Now they’re doing things like properly explaining volunteer roles and tasks, the length of commitment required, and why the organization needs youth as volunteers.”*

**Table 6: Methods used to exchange knowledge**

Knowledge Exchange Methods	% of Respondents
Workshop	53
Discussion meeting	35
Training session or course	28
Conference or seminar	25
Mentoring	8
On-site visits	8

### Tips for knowledge exchange

- **Strive for as much interaction as possible with your audience:** People learn better when they can participate.
- **Encourage audience reflection:** Using active learning techniques, such as encouraging participants to reflect on their experiences or brainstorming increases learning and motivates people to apply what they have learned.
- **Provide opportunities for participants to be heard:** This is particularly important when you are bringing together participants who do not normally interact with each other.
- **Provide participants with various perspectives:** This can broaden and deepen participants’ understanding of the information being presented and is particularly effective in training sessions.
- **Real-life experience:** To complete training sessions and courses, make connection to real situations and let trainees earn various experiences and knowledge and then exchange them.

### Outcomes of Knowledge Transfer and Exchange

Outcomes of knowledge transfer and exchange activities are mainly changes that occur in audience and could be attributed to an activity. Some outcomes may present right after the activity and some may be gradual and take longer to be observed. Being familiar with the types of knowledge transfer and exchange outcomes can better demonstrate the effectiveness of these efforts and what should be expected from them.

The organizations that participated in our research reported a number of positive outcomes that they believed resulted from their knowledge transfer and exchange activities. Some of these outcomes,

such as increased awareness of an issue, changed motivations and attitudes, or increased demand for knowledge, were observed almost immediately. Others, such as increased volunteerism and improved practices, were more long-term. Collaboration was a positive outcome that was observed both during and quite after an activity.

**Increased Awareness:** Knowledge transfer and exchange can increase the audience awareness of a specific issue. One of the organizations that participated in our research reported that a presentation it did led to increased awareness about potential new sources of volunteers:

*“... There was one organization that worked in heritage and said, ‘we never thought about asking young people to volunteer. We always thought heritage meant old,’ and brought the old people in. And there were actually some young people who were interested in what they were doing. They actually made a connection, and I believe the young people went to volunteer for that organization.”*

Another organization said that it had observed increased awareness of the volunteer opportunities available in the community:

*“It was startling when we were doing presentations; you’d talk to somebody and they might not be aware of volunteer opportunities, which was the reason for putting Volunteer Connections in place. Once people got in there, they learned a lot more about what was available in their communities.”*

**Changed Motivation:** Knowledge transfer and exchange can lead to changes in participants’ emotions and motivations. A presentation by one organization got youth excited about volunteering and contributing to their community:

*“[A]s a part of being involved in the initiative, [the students] built resumes, so the young people who participated in the information sessions really got excited about volunteering and they come in for volunteering in school. They actually have a quote by one person who attended one of the focus groups, ‘I want to make a difference in my community,’ so the young people really got a lot out of this.”*

**Changed Attitudes:** Knowledge transfer and exchange can often change participants’ attitudes. One organization reported that, after a presentation, individuals with intellectual disabilities started to think of volunteering as something they should try rather than something they could not do:

*“I think [after the presentation] people there [with intellectual disabilities] were actually thinking that maybe they’d like to volunteer. I think [before] some didn’t think they could.”*

Another organization reported that, as a result of a workshop it held, staff members at a correctional facility who had previously thought that volunteering did not hold much value for inmates began to change their minds:

*“A lot of the staff in the prison didn’t even consider volunteering as important for an inmate to do. But I know from their comments that now they’re looking at that differently. They learned about supervising, meeting, and supporting ex-offenders when they go into the community to volunteer and now they’re thinking, ‘Maybe I should encourage them to look for volunteer opportunities so that they can spend their time more productively.’”*

**Increased Demand for Knowledge:** Successful knowledge transfer often results in increased demand for information resources and products:

*“I’ve received excellent feedback; I’ve actually been invited back to several sessions to do a follow-up.”*

*“People are still calling our toll free phone line, [...] and since this project ended, we’ve gotten over 15,000 visits to that section of the website alone, so we averaged about 750 a month.”*

Many organizations reported receiving requests for continued research and for the development of new resources to support ongoing learning:

*“The feedback has all been quite positive; people would like to see more workshops in the communities. They would like to learn more facilitator skills and they would like to take training.”*

*“... The biggest thing that I took from it was that they were hoping there would be a part two to this, where we could take them up one level. They thought this was great, but that there was still more for them to learn.”*

**Collaboration:** Knowledge transfer and exchange can lead to collaboration between and among organizations and individuals. This can take the form of pooling of funding, collaborating on a project, or simply drawing on each others’ experiences or needs:

*“When I was at the conference in St. Johns, I met up with someone who is involved with sport and recreation ... and she said that having this [Conference] would be really important because she could see a partnering and sort of a sharing of the funding... She was really excited to be able to be doing her networking and linking.”*

*“There’s also a couple of what they call ‘community stars’ there; they keep it going and usually have volunteers that are willing to work with them. In the last year or so, if I need volunteers, I know who to phone in the communities because of those workshops.”*

**Increased Volunteerism:** Increased awareness and changed motivations and attitudes are immediate outcomes that can lead to changes in behaviour and, ultimately, an increase in volunteerism:

*“We printed articles in our bilingual community newsletter, in local Chinese newspapers, as well as talked on the radio to promote our new resource and our training. Through these, we recruited quite a number of volunteers who actually told us they had never heard about resources for people who face domestic violence before. So they are themselves empowered... Many volunteers then became co-facilitators for other training sessions. So they became very dedicated to our agency and that is how our project has evolved. The first year, we trained around 20 interpreters. After that, we have kept up with the training and have trained 10 interpreters each time. Before the training we could only help around 60 people a year. Now, we have done 300 or so interpretations in the last year already.”*

**Improved Practices:** Translating knowledge into practice and changing the way organizations do things was identified as the most desirable outcome of knowledge transfer and exchange<sup>9</sup>. One funded organization reported that it was able to show its audience how to improve its events:

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<sup>9</sup> See F., Zarinpoush, S., Von Sychowski, & J. Sperling (2007), *Effective Knowledge Transfer and Exchange: A Framework*, for more details.

*“...There was one organization that came away from that workshop thinking that they were going to really try and make their next big stewardship event as a family-focused event, taking some of the concrete examples [we provided].”*

Another organization observed participants making changes to how they worked and making use of the tools or frameworks it had provided:

*“One leader told me that she used to recruit youth without properly explaining what the task involved or why the organization needed youth volunteers. Now she used [our] framework to highlight proper issues when recruiting youth... And youth are participating more because they feel more respected and supported in their volunteering.”*

The organizations that participated in our research did not use their newly developed knowledge solely to help other organizations and individuals. The majority (80%) of organizations also used their newly developed knowledge for their own purposes, such as:

- to increase awareness of their organization;
- to recruit volunteers and improve volunteer retention;
- to train volunteers and/or staff;
- to prepare an action plan;
- to identify the organization’s needs and improve their infrastructures;
- as a basis for follow-up and/or future research;
- in discussions, consultations, workshops, reports, and proposals;
- to organize new events (e.g., flagship events);
- to apply for grants and leverage more funding; and
- as teaching materials, required reading, or part of a postsecondary curriculum.

### ***Challenges in Knowledge Transfer and Exchange***

The organizations that participated in our research encountered three main challenges in carrying out knowledge transfer and exchange: lack of feedback and follow-up mechanisms, lack of time, and inadequate opportunities for long-term funding.

**Lack of Feedback and Follow-up Mechanisms:** Gathering feedback and following up on knowledge transfer and exchange is important if organizations are to gauge the extent to which their knowledge were useful to their audiences. During interviews, few organizations mentioned they were able to measure impact formally by counting website hits, making follow-up phone calls to participants, or follow-up visits with participants. Most, however, said that lack of financial and/or human resources had prevented them from setting up mechanisms to gather feedback or do follow-up:

*“One of the challenges is that we know a function certainly had value but we just don't have the resources to be able to go back two months later and say, ‘What have you actually seen? Other than a couple of things that I heard anecdotally we don't have any good numbers.”*

*“This project is an example of where we wanted to create these tools, we wanted to create this course, and our energy went into that and promoting it as best we could, but there weren't enough resources left to really do any sort of critical analysis about the impact or to really effectively learn from what they've done... [The biggest challenge] is ... how you would even measure these kinds of outcomes.”*

Many organizations relied on informal anecdotal feedback. For example, one organization received feedback as a result of ongoing relationships with their audience:

*“I certainly got informal, verbal feedback. That’s not to say that we didn’t have an impact, it’s just that we haven’t had direct discussions. [...] We’re looking at better ways of providing more concrete documentation and evaluation of the results of our projects. But we do hear from groups anecdotally because of our ongoing relationships.”*

**Lack of Time:** Many organizations simply did not have enough time to organize and coordinate knowledge transfer or exchange activities or to improve the quality of information they were able to present to their audiences. One organization reported that it takes time to find the right conferences or meetings at which to present the newly developed knowledge and to write proposals:

*“It’s not so much that people don’t want to hear, it’s actually arranging the time to get them to hear, ... for example, submitting a description of what you want to do in a workshop or a regional conference. The opportunity to do that needs to present itself, we need time to go out and hunt it up. That’s the major drawback.”*

It was also a challenge for people to find the time to attend meetings, presentations, or workshops:

*“People’s time [is a big] factor... trying to get people in one place at one time.”*

*“The challenge is the timing; trying to find a date that the most people can attend.”*

Lack of time also has an effect on the amount and quality of information that knowledge developers can present to their audiences. One organization explained it this way:

*“Some of these things you can’t do in a 10-minute sound bite ... In order to prevent dumping unneeded bits of information on people, to understand this issue, and to move thinking requires not [only] my presentation time but [the audience’s] processing time to get their head around that. You can’t do that in 60 minutes, 90 is frankly a bare minimum, three hours is a really good time, and a full day is a joy.”*

*“There is a time barrier. With more time probably one could do follow-ups with groups and say, ‘OK, you’ve had a chance to read this, now let’s do some action planning on how you might behave differently here and what things you could learn from this.’ All those things would be useful, but that’s not something that could be done right now [...] because it wasn’t built into the [funding] contract.”*

**Lack of Long-Term Funding:** The issue of funding was raised by many organizations as a perennial challenge to conduct any knowledge transfer and exchange activities. In particular, they found it difficult to create sustainable programs when the funding was typically given for isolated short-term projects.

*“... getting the results, or at least getting the model into other organizations has not been very successful, mainly because of lack of resources to do that. We often get funding for one-time-only time-limited pieces and building sustainability into all of those pieces is very difficult.”*

As mentioned earlier, lack of funding often limits an organization’s capacity to follow up and monitor the impact of its knowledge transfer and exchange activities. This in turn jeopardizes an organization’s ability to tailor its resources to the needs of the intended users. One organization noted that it could have been done with longer-term funding:

*“... Instead of just ending [our project], we’d build a portion that would be follow-up just to work with [our participants], even if we went around six or eight months later and contacted them and said, ‘where are we at today? And how is it working for you?’”*

Finally, some organizations mentioned that long-term funding was essential for making sure that information resources and products are used and will continue to be up-to-date and relevant:

*“Consistency is definitely important for successful knowledge transfer. When the funding ended for this project, the aquarium granted two months of bridge funding because we knew that we had a good thing going [...]. I think if this project had ended, we may well have simply developed a whole series of dust collectors.”*

## **Conclusion**

The nonprofit organizations that participated in this study carried out various activities and had some tips on how to do them effectively. We reported these activities and results in three groups:

- **Group One:** activities to create conditions for knowledge transfer and exchange were highly reported by organizations. Developing multiple resources, use of local media for promotion and use of other events for distribution were common and identified as easy low-cost mechanisms. Preparing both paper and electronic versions of resources enabled organizations to respond to the needs of many potential users.
- **Group Two:** activities to transfer knowledge were also reported by almost all organizations. The most common activity was to have a stand-alone face-to-face presentation. Organizations found presentations to be effective when they made the effort to know the audience and understand their needs and expectations. Most of the tips organizations suggested for effective knowledge transfer were about knowing the audience
- **Group Three:** among activities to create a setting for knowledge exchange, workshops were highly used. Workshops reported to be effective when the content is engaging and create group interactions and include exercises that reflect on the participants’ experiences. Discussion meetings could create opportunities for different voices to be heard and training sessions presented different perspectives and real-life examples. Among all activities grouped here, workshop seems to be the most familiar one that nonprofit organizations are confident to organize and deliver it. The suggested tips on conducting knowledge exchange were mainly about creating an environment conducive to audience engagement.

The use of some delivery methods was rare by the participated organizations. Webcast and webinar were hardly reported despite their growing market in general. Also, our study could not properly capture the benefits and effectiveness of on-site visits and mentoring because they hardly employed.

Organizations were most likely to report immediate outcomes that were observed at the knowledge transfer or exchange activities or shortly thereafter. For example, some of the immediately observed outcomes included increased awareness, changed motivations and attitudes, and increased demand for knowledge. The outcomes that took longer to appear were increased volunteerism and improved practices. Collaboration was a particular outcome that was perceived both during or right after an activity as well as in the future activities of organizations.

The findings of our study suggest that once knowledge is developed, there are great opportunities to use it inside the organization to improve practices such as volunteer management, programming and

planning. The organizations were able to list a wide variety of ways they used the knowledge they gained. Although organizations provided some examples of external use of knowledge and its effects, the information was less and anecdotal since the most of organizations did not have financial and human resources to establish a systematic way of following up with their audience and identifying the external use and effects of their knowledge. This resulted in gathering informal anecdotal feedback to be a common way, which points to the great amount of qualitative data that exist in the sector. This also suggests that nonprofit organizations need to develop skills to manage and analyse qualitative information in order to use that information for planning and decision making.

Lack of time and longer financial support to better plan and perform activities are other barriers of knowledge transfer and exchange in the sector. These barriers limited organizations to properly train their audience to apply the newly developed knowledge. These barriers particularly affect activities related to knowledge exchange, since exchanging knowledge occurs through a process and requires follow-up mechanisms, time, and financial support to communicate with the audience, gather feedback, train the users, and observe changes in practices.



## **Case Studies of Knowledge Transfer & Exchange**

This section highlights the activities of five organizations in their own language. These cases, while echoing some findings of our study, offer a number of insights into successful knowledge transfer and exchange that may be helpful to other voluntary organizations, community groups, and other interested stakeholders.

### **Case One: Make Connections**

In 2004-2005, the Community Services Council of Newfoundland and Labrador received funding from the Community Support Centre to conduct a pilot and demonstration project to help link voluntary organizations through technology. This case shows how promotion and making connections can increase the effectiveness of knowledge transfer and exchange.

*Volunteer Connections, which received funding through the Community Support Centre, helped improve enVision.ca's online volunteer [bulletin] board so that users from around the province could post and find volunteer opportunities more easily. CSC took an exciting "high tech, high touch" approach that combined in-person telephone support with available online resources. In addition to the website, volunteers were available, via a toll-free number, to help organizations and individuals with volunteer postings.*

*Promotion and marketing ranged from a media launch through CTV's local affiliate, to ads that ran at local theatres, to more traditional means such as bookmarks and flyers. There were also students doing outreach work to organizations and communities around the province.*

*In the first year, Volunteer Connections received about 6,000 visits, and there have been more than 15,000 visits to that section of the website since the project was completed. Volunteer postings continue and the toll-free line still receives calls, which speaks to an effective campaign. Organizations have reported successful recruitment of volunteers as a direct result of Volunteer Connections. One organization got so many calls, they asked for the volunteer opportunity to be taken down shortly after posting.*

*This experience shows that what works well is getting out there and meeting with people, doing things at a local level, getting resources on the ground. Combined with technology, volunteers and organization staff have the opportunity to acknowledge and learn from each other, and stay connected. The "high touch, high tech" method could build the capacity of the voluntary sector in a meaningful way.*

### **Case Two: Package Knowledge in Different Format**

In 2005-2006, Saskatchewan's Riverside Community School Association received funding from the Knowledge Development Centre to examine the motivations of school-based female volunteers (including Aboriginal, non-Aboriginal, and Métis women) in low-income communities, the benefits of involving these women as volunteers, and the challenges associated with such a program. This case demonstrates the value of adapting and translating new knowledge into variety of accessible

and user-friendly information resources and products and shows how to use resources for effective knowledge transfer.

*We have a very active volunteer program that involves not just parents but community members in the life of the school. Our study identified barriers to participation of women and what components had to be present for them to be involved in volunteerism in an inner city situation.*

*We presented the report at a conference with researchers from across Canada and got very good feedback especially because a lot of them felt disconnected from what happens on the front lines at the community level, so they were really excited to hear about [the researcher] working so closely with people in the community.*

*On the other hand, we wanted to show those are not just things on paper, that the components for parent and community involvement are what we live every day. So we produced a DVD with the help of one of the teachers where the women touch on the different areas of a successful volunteer program [...] like how to make a program welcoming, how to work with the basic needs of the people who are there and other needs like educational and their needs for employment, and for being engaged as volunteers in the community in a meaningful way. [...] They actually tell their stories, why they're here, what keeps them here, what's necessary. We wanted to make it as authentic as possible so that when other community schools look at it they can take the information and apply it, or incorporate it into their own situations, without us having to come along to teach it.*

*We had another conference or gathering with about 130 people: school staff, community members, and other agencies with similar mandates [...] where they met the volunteers here at our school, had a meal that was made by them, and viewed the DVD. Then the researcher talked about some of the findings, and we broke into sessions to talk about how people could use the information in their own organizations or volunteer practice.*

*People were raving about the DVD itself. They loved the format and that it's done through the stories that came from the volunteers, their words, their experiences. The parents and community members were saying, "Hey, they can do it, so can we." [...] There was a lot of talk about replicating the success they were seeing in this school. We received some feedback from a brand new coordinator that was here the day of the gathering – she showed the video at their school and it's already being used by their parent council to develop a volunteer program.*

*In our own school, we used the DVD to actually train staff in what community education is all about. They were very surprised at how much is happening – and the quality of the volunteer work – right here in the school, so it was really beneficial for them to see it. We also host a learner's support group through a literacy network and use the video as a way to help alleviate people's fears about volunteering. [...]*

*It's taken us awhile to come up with the right tools and to be able to disseminate it. We learned that it's really effective to be able to do it on two fronts – the more academic front and then the hands-on front that is user-friendly. [...] Having the research itself as a resource and having the DVD as a resource really complement each other. The research gives validity for what we're doing to a group of administrators and government representatives in a way the DVD doesn't. The DVD is something we can give directly to other organizations for them to see what is happening, it speaks to them in a way that the*

*research wouldn't. We used an approach that covers more than one area because there's a contingency of folks who are really diverse in how they access the information, or their reasons for wanting to know about it.*

### **Case Three: Engage Your Audience**

In 2005-2006, the John Howard Society of Moncton, New Brunswick, received funding from the Knowledge Development Centre to identify promising practices for supporting the recruitment and placement of former offenders as peer-volunteers in community-based rehabilitation programs. This case reinforces the importance of knowing the audience and planning interactive activities to successfully transfer and exchange knowledge.

*Our agency is involved in carrying out research on a regular basis with local universities, and we feel it's really important that the information gets disseminated in a way that is relevant to the sector. [In this project], we were very specific about who we thought should receive the information. I knew from my work in this field that there's not a lot of time, attention, or resources put to unit managers who take care of volunteers in the prison system, even though community involvement is part of Corrections Canada's mission statement. I'd heard about the frustrations from volunteer managers around lack of resources and support. So I knew they needed the information and the support. [...]*

*The audience for the workshop was volunteer managers or volunteer supervisors from the prisons. There are five federal prisons in our region, and each one has one or two individuals who are responsible for managing volunteers and/or inmates who volunteer. They have a dual role: managing volunteers from the community who come into the prison and working with inmates who are preparing to go back into the community.*

*In the workshop, we had planned to break out into small group discussions but it ended up being more of an interactive workshop with all participants jumping in whenever they had questions or comments, or wanted to discuss an issue further. I sensed from their comments that a lot of the workshop participants didn't consider volunteering as important for an inmate to do. But I know from their comments as the workshop unfolded that now they're looking at that differently. I heard comments such as "Maybe I should encourage them to look for volunteer opportunities so that they can spend their time more productively," and "Maybe I should be encouraging volunteer activities when an inmate does an [escorted temporary absence]." They learned things they didn't know about supervising, giving feedback, and supporting ex-offenders when they go into the community to volunteer. And they left the workshop with some arguments to build a case for support for the inmate, and feeling more knowledgeable in approaching a community agency about having an inmate volunteer.*

*The prison staff also expressed how very grateful they were to have had the opportunity to get together and exchange information with their peers. During the workshop, they were able to learn from each other, to hear how their colleagues had dealt with the same frustrations, challenges, processes, etc. One of the things they said was that being able to share this information and talk to each other helped them to put the risk part of the job that hangs over their heads into perspective along with the benefits of encouraging an inmate to volunteer, to look out for things that they might not have thought about before. [...] So the workshop really opened their eyes to a whole bunch of possibilities and I think they felt just*

*a little rejuvenated, a little inspired to encourage volunteerism and also reminded them to give more attention to the volunteers that they have.*

*As a result of the discussions we had during the workshop, I offered to send a copy of the report to each of the wardens so that when the volunteer managers went to talk to them, which they said they planned to do, the warden would have information from the outside and inside, which would hopefully reinforce the notion that more resources need to be set aside for volunteer management—There may even be an opportunity to take this workshop to other regions in Canada in the new fiscal year, which is very exciting.*

*The activities we undertook in regards to dissemination of the research just confirmed [the importance of] reporting the findings in a way that is useful to the consumer. [...] [The researcher] who worked with us wanted to a research report and I had to remind him, “If you just gave me an academic report, as a nonprofit director, I wouldn’t use it, I couldn’t use it – I wouldn’t have the time to sift through it and use the information in a practical way. So we don’t need to produce a research report. We’ve got to produce something that nonprofits can and will easily use. The interactive workshop format proved to be very relevant and effective in disseminating the findings from our research.*

### **Case Four: Use Knowledge to Expand Volunteerism**

In 2004-2005, the Chinese Community Service Association of Calgary, Alberta, conducted a pilot and demonstration project with funding from the Community Support Centre to promote volunteerism within the Chinese community by developing a volunteer interpreter training program. As their experience shows, knowledge transfer and exchange – in this case, developing and publicizing a manual and training on sexual abuse – resulted in more and better-trained volunteers who are dedicated to the organization and help to expand its capacity to offer services. This project achieved positive outcomes, although unexpectedly, when they evolved awareness, addressed a need, and equipped users to implement the knowledge they learned.

*During the project, we trained our own volunteers, and those from partner agencies like Calgary Community Against Sexual Abuse, on interpretation skills and techniques specifically in the area of domestic violence. We had several objectives: to fill the capacity of our volunteers so they become good interpreters in cases of domestic violence, and through this they are empowered; to fill the capacity of other agencies who want to be more culturally sensitive, who want to increase their diversity; and because domestic violence is such a taboo area, we wanted people to start talking about it.*

*We printed articles in our bilingual community newsletter, in local Chinese newspapers, and talked on the radio to promote our new manual and our training. We found these are the most effective means to promote because they are free and people can access this very easily. We received lots of inquiries from people who told us they had never heard about resources on domestic violence and also got calls from people who needed interpreters. The first year, we trained around 20 volunteers.*

*The training is several sessions, actually several days. First we do an orientation, talk about volunteering, and what is required or expected for a volunteer. Then a trainer or a specialist will present on the interpretation part around the law, medical terminology, and resources, and also self-care. This is followed by discussion and activities like role-play, so there is lots of practice. At the end, kind of like graduation night, we bring in other service*

*providers like the police, the City of Calgary and so on, to introduce our interpreters and let them talk about their experiences. They network and learn about the significance of interpretation and how our programs can reach different groups. [...]*

*When we started, I did not expect such a good response, because domestic violence is quite a taboo area and because Chinese people do not talk about violence. After the project, we identified there was a need so we continued training, and each time have trained about 10 interpreters. Some of the initial volunteers became co-facilitators and then afterwards headed up the program, so that is how our project evolved. [...] They became very dedicated to our agency. Some of them told me that they have been in Calgary for a long time, like more than 10 years, but that they had never volunteered before. A few even found they have an interest in the area and have applied this to go further in their own studies, like law.*

*We have received a case from the police requesting our interpreters' assistance. We were also asked by an agency working with people with disabilities to train their facilitators. And we linked up with another organization, the Calgary Chinese Senior Citizens Association, to train their volunteers. Before the training, we could only help around 60 something people a year. In the last year we have done 300 and something interpretations already.*

### **Case Five: Use the Feedback**

The Vancouver Aquarium Marine Science Centre received funding from the Community Support Centre to conduct a one-year (2003-2004) pilot and demonstration project on how to involve and manage youth as volunteers in environmental stewardship. Their case shows that listening to feedback can affect future knowledge transfer activities as well as an organization's internal use of knowledge.

*The CVI pilot project was a structured program providing field training in environmental action for high school students mandated to complete 40 hours of community service in order to graduate. The Aquarium has had a youth volunteer program since 1996, but this project allowed us to focus attention on a key area of our mission: direct action. [...]*

*Through the project we received feedback from the participants that the youth had a number of their own conservation action ideas and needed support to make them happen. As the Stewardship project ended it morphed into a program called ACT [Aquatic Conservation Team] that runs yearly from September to May (Since its inception 16 high schools and 75 students from the Lower Mainland have participated and this year our first school from the Interior of the province is on board). We receive applications from youth on conservation projects they want to do, and on an annual basis support about 30 students in creating and delivering projects and peer education within their own communities.*

*Experimenting with different ways of involving youth, [...] along with the fact that we saw youth had the ability to mentor their peers and the feedback from the kids about wanting to get more involved was the foundation piece that said to my organization 'this is valid'. It confirmed to the senior management that we can make an impact using a new volunteer management strategies and that tapping into environmental action with youth is an unlimited potential resource for volunteerism and community action*

*We were able to use the CVI stewardship program as a springboard to a new program led by the same coordinator, ensuring continuity of knowledge and relationships. Instead of developing a whole series of dust collectors from the Stewardship for Youth project we were able to morph it into an new volunteer experience and continue to make the results of the CVI project living, valuable documents, information, and experience. Much of the ACT program was designed and redesigned over the years based on feedback from the participants*

*The resources developed during the pilot project – recruitment and screening tools, tip sheet and manual – have come together as a toolkit for ACT. The youth take the materials away with examples of successful environmental teacher/action/youth experiences and it helps give them a goal and some resources for their own work. We continue to use the survey form as an evaluation tool to find out how things are going in each community.*

*[...] Two other really interesting things for us working from the pilot project to ACT today is first, it's pushed us to take a look at our own organization and make sure we're representing the calibre of conservation talk and action that we're demanding from the youth (for example, using recyclable paper, biodegradable plates, etc.). Secondly, it forced us to examine the reliance on old formats for transferring knowledge and encourage that sort of shift in thinking that we want. The youth have been a big driving force around more extensive use of our website... we're talking about a group that gets most of their communication through technology so our team has been thinking about how we can start doing things differently in terms of text messaging, e-mailing conservation tips, or creating a youth driven webpage that links to our own web page so that they can have an intranet around ideas and action and change.*

*Without the feedback from the CVI pilot participants and the willingness of the Aquarium to experiment with new ways of involving youth, the ACT program would not exist. The most significant lesson learned is the value of feedback and communication in program design and development. We look forward to the ACT program continuing to grow in size, scope and impact.*

## Appendix A: Survey of CVI previously funded projects

1. Name of the funded organization:
2. Title of the funded project:
3. Theme of the funded project:
4. Which of the following information resources or other products did your project produce? Please indicate it by entering the number of products for each category. Leave it blank if you did not produce any. (Check all that apply)

*INFORMATION RESOURCE OR OTHER PRODUCT      QUANTITY=*

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- Research report
- Fact sheet
- Tip sheet
- Workshop materials
- Tool kit
- Manual, handbook, or guide
- Peer-reviewed articles
- Database or map
- Forms and screening tools
- Surveys and questionnaires
- Training materials
- Theatre production
- Video and software
- Website and telephone lines
- Other (please specify): \_\_\_\_\_

***For the next set of questions, please think about the ways that you have made the information resources or other products developed through your project accessible, and when USERS CAME TO YOU.***

5. How did you make the information resources or products of your project **accessible**?
  - Website
  - Email
  - Phone line
  - Mail outs
  - Distribute them in an event
  - Other (please specify): \_\_\_\_\_
6. How did you **promote** the information resources or products of your project to let your stakeholders know about them? (Check all that apply)
  - Media release
  - Webcast

- Brochures or flyers
  - Communication plan
  - Other (please specify): \_\_\_\_\_
7. Have you received inquiries about the information resources or products of your project?
- Yes
  - No
  - Not sure
8. Approximately how many copies of your information resources or products did you directly provide to users **who contacted you** about it?
- None
  - 1-99
  - 100-499
  - 500 or more
  - Don't know
9. Altogether, how many users do you estimate you have reached through these activities (e.g., **websites, mail outs, distribution at events**, etc.)?
- None
  - 1-99
  - 100-499
  - 500 or more
  - Don't know
10. Can you name three organizations or individuals that confirmed the use of your CVI information resources or products?
- a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
11. Did any of these activities occur **while the project was underway**?
- Yes
  - No
12. Did any of these activities occur **after the project ended**?
- Yes
  - No

***For the next set of questions, please think about the activities that you did as the knowledge PRODUCER or TRANSFEROR.***

13. Did you disseminate the information resources or products to a group of targeted people or organizations?
- No
  - Yes. – If yes, to whom? \_\_\_\_\_



14. Which of the following methods have you used **for the purpose of presenting** the information resources or products your project developed? Please indicate it by entering the number of activities for each category. Leave it blank if you did not do any. (Check all the apply)

- Peer-reviewed publication                      How many?
- Articles in local newspaper or magazine                      How many?
- Webinar                      How many?
- Presentation                      How many?
- Training session                      How many?
- Conference or seminar                      How many?
- Workshop                      How many?
- Discussion meeting                      How many?
- Other (please specify): \_\_\_\_\_                      How many?

15. Which of the following methods have you used for **the purpose of exchanging** your gained knowledge with the participants' knowledge and experiences? Please indicate it by entering the number of activities for each category. Leave it blank if you did not do any. (Check all the apply)

- Webinar                      How many?
- Training session                      How many?
- Conference or seminar                      How many?
- Workshop                      How many?
- Discussion meeting                      How many?
- Other (please specify): \_\_\_\_\_                      How many?

16. Which of the following methods have you used for the purpose of **encouraging users to relate** the information resources or products of your project to their practices and implement them? Please indicate it by entering the number of activities for each category. Leave it blank if you did not do any. (Check all the apply)

- Training session                      How many?
- Workshop                      How many?
- Mentoring                      How many?
- Discussion meeting                      How many?
- On-site visits                      How many?
- Other (please specify): \_\_\_\_\_                      How many?

17. Altogether, how many users do you estimate you have reached through these activities (e.g., **disseminating, presenting, and sharing**)?

- None
- 1-99
- 100-499

- 500 or more
- Don't know

18. Did you receive any feedback about your information resource or product?

- Yes – If yes, please provide examples:
  - A positive feedback received: \_\_\_\_\_
  - A negative feedback received: \_\_\_\_\_
- No

19. Have the information resources or products been used by your own organization?

- Yes – If yes, please tell us how? \_\_\_\_\_
- No

20. Have you used what you learned during this project in other projects?

- Yes – If yes, please tell us how? \_\_\_\_\_
- No

21. Did any of these activities occur **while the project was underway**?

- Yes
- No

22. Did any of these activities occur **after the project ended**?

- Yes
- No

23. Did you conduct any follow-up work/research/project?

- Yes – If yes, please name them: \_\_\_\_\_
- No

## **Appendix B: Interview guide for CVI previously funded projects**

In the questionnaire, you identified the ways you have used or shared the information resources or products your project developed. Now I'd like to ask you a few questions on each activity.

1. For the (name the activity):

- a. Did you have a specific audience? Who was your audience?
- b. How active were the participants? (any examples, stories)
- c. What did the audience learn/take away from this (name the activity)?
- d. What, if anything, did you learn/take away from this (name the activity)?
- e. Did you receive any feedback? How? When (during the event or after)?
- f. What positive feedback did you receive? What negative feedback, if any, did you receive?
- g. Did anything surprise you (i.e., unexpected results/effects)?

2. What prompted you to conduct (name the activity)?

PROBE:

- in the work plan to funders
- demand from users
- received more funding to do so
- part of the organization's culture

3. What was the purpose of doing (name the activity)? What had you hoped to achieve?

4. To what extent did you succeed?

FOLLOW-UP:

- a. What evidence do you have of your success?

5. Did you observe any changes in knowledge, skills, or behaviour of the participants as a result of your knowledge transfer activities?

6. Think back to all activities you did to transfer the information resource or product of your project and name one that in your opinion was the best. What made it so good?

FOLLOW-UP:

- a. From your experience, what activity has proven most effective to promote your resource? Why?
- b. From your experience, what activity has proven most effective to deliver the information resource or product your project developed into the hands of potential users? Why?
- c. From your experience, what activity has proven most effective to encourage users to implement the information resource or product you developed into their work? Why?

7. Now, think back to an activity where you shared the information resource or product your project developed that you felt was particularly disappointing. What made it disappointing? What went wrong?

FOLLOW-UP:

a. If you were to conduct this activity again, what would you do differently?

8. In the questionnaire, you mentioned that you did a follow-up work/study on ... tell me about it.

9. What are some of the challenges or barriers you have faced conducting knowledge transfer?

10. What are the three things you have learned about knowledge transfer from doing these activities?

11. What advice would you give other voluntary organizations that want to engage in knowledge transfer?

12. What is your favourite knowledge transfer activity? (i.e., you feel comfortable and confident to do it.)

That covers everything I wanted to ask you. Is there anything you'd like to add?