

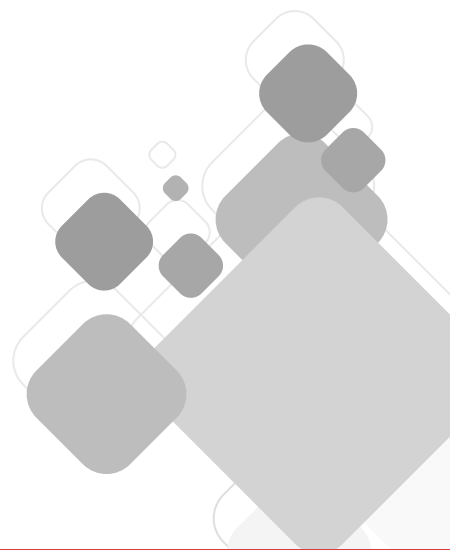
RESEARCH MEETS POLICY

@SFU summer institute

Research Meets Policy Toolkit

Creating a Summer Institute

Developed by Lupin Battersby, Alison Moore, Jennifer Chutter, Sophie Ashton, and Valorie Crooks
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Introduction

In this toolkit you will find all you need to plan and implement a Research Meets Policy Summer Institute at your institution. In the summer of 2021 Simon Fraser University (SFU) hosted and evaluated a pilot of Research Meets Policy at SFU (RMP@SFU). This toolkit is informed by the lessons learned through the planning, implementation, and evaluation of RMP@SFU.

What is RMP?

The RMP@SFU is a one-week, half-day summer institute hosted online focused on skill building for communicating to policy audiences. The 30 institute Fellows were all SFU graduate students and post-doctoral fellows from across all 8 faculties. Four of the days were focused on learning with day five focused on demonstrating and celebrating the learning. The four learning days featured a faculty member with experience in policy communications and a policy presenter sharing their experiences in the policy landscape. Faculty and policy presenters also represented a variety of disciplines, positions, levels of government, and equity deserving groups.

Our aim for RMP@SFU was to grow participants' skills to communicate research beyond traditional scholarly and scientific outlets and increase their potential for policy engagement and impact.

Our approach was to achieve this aim was to create an opportunity for graduate students and post-doctoral fellows across disciplines to connect with each other and hear real voices and stories of policy and politics while learning skills for communicating their research for impact.

Why host an RMP summer institute at your institution?

"Effective communications with policy-makers is a key skill that researchers must develop if they are to facilitate the incorporation of science into policy... [I]ncluding policy communication skill development into professional training will provide the current and future generations of scientists with the tools necessary to engage with policy-makers" [1]

Researchers are increasingly seeking policy engagement and impact [1,2]. However, many are not trained in how to communicate with and engage policy audiences [1-4]. Meanwhile, informing policy and political discourse is often a starting point for research impact and even new research innovations. In the current age of misinformation, it is critical that the policy community is networked with researchers who can support informed decision-making [1,5]. One way to achieve this is to build research-to-policy communication skills among trainees and emerging researchers through targeted efforts. RMP@SFU significantly enhanced SFU's research communication training landscape, and provided transferrable skill development.

Participants found the program valuable, engaging, and important. They reported that they learned new strategies, tools, and approaches for engaging policy makers while also gaining confidence in their voice and their potential for having a positive impact on society. Many have already used the skills they gained as evidenced by media activity, policy briefs, and other engagement activities they have completed since completing the program.

Planning Activities and Steps: Timeline

A. 5-6 Months prior

1. Strike planning committee
2. Identify a primary coordinator or hire a grad student for support
3. Committee reviews/adapts/decides
 - a. Draft budget
 - b. Institute goals
 - c. Overarching learning objectives
 - d. Format and location (in-person/hybrid/online)
 - e. Review EDI and accessibility best practices for events
 - f. Draft program schedule
 - g. Identify list of potential presenters (teaching, policy¹, opening/closing)
 - h. Application and adjudication process
 - i. Sets dates and times

B. 4-5 Months prior

1. Develop logo and other branding
2. Preliminary promotion – save the date, awareness building
3. Invite presenters
4. Invite Elder, other opening remarks and closing remarks
5. Prepare application tool

C. 3-4 Months prior

1. Open application – for one month; close 2.5 months prior to event
2. Promote institute
3. Adjudicate applicants – provide notice of acceptance 1.5 – 2 months prior to event
4. Identify and order swag items (on-line) or plan catering (in-person)

D. 2-3 Months prior

1. Confirm and meet with presenters
 - a. Identify pre-readings, viewings, or other preparation
 - b. Gather presenter pictures and bios
 - c. Request slides or summaries prior to event
2. Email applicants re: decision
3. Ensure accepted applicants confirm they can attend
4. Draft welcome package
5. Create on-line course shell (e.g. Canvas) for all materials
6. Identify daily feedback process
7. Finalize program, learning objectives etc. & create a backup plan.

E. 1 Month prior

1. Send welcome package
2. Send participant information to presenters
3. Upload materials to Canvas

F. 3 Weeks prior

1. Send out swag bag materials
2. Draft post event satisfaction survey

¹ Consider a researcher-policy duo that has established relationship and examples to draw from working together.

G. 2 Weeks prior

1. Plan orientation activities
2. Plan check-in activities
3. Draft daily agendas with roles, times, other important information
4. Send reminder to participants and presenters including request for slides

H. 1 Week prior

1. Host orientation session
2. Last minute revisions to agenda, materials, plans
3. Ensure all materials are uploaded

I. During event

1. Ensure Elder is paid for their time
2. Provide presenters and team with daily agendas, revised as needed the day before
3. Review any feedback, questions, input at end of each day
4. Daily team huddle to review any pressing issues before session starts
5. Support daily check-in activities
6. Host event debrief meeting with team

J. After event

1. Send satisfaction survey to participants
2. Send out certificate of completion
3. Send thank you gifts to presenters
4. Send short feedback request to presenters
5. Analyze event survey

Promotional Email Template

Dear [NAME],

Please share the following training opportunity with grad students and postdocs (promotional poster attached).

Graduate students and postdoctoral fellows are invited to apply to the [HOST UNIT] Research Meets Policy @ [INSTITUTION] summer institute. This exciting week-long virtual institute will take you beyond traditional scholarly outputs and increase your potential for policy engagement and impact.

The summer institute will be held from [DATE AND LOCATION]. Applications are due on [DATE] for this **free** training and networking event.

Why should you attend?

- Build your network
- Gain transferable skills
- Increase your impact
- Get recognized

Apply now!

Spots are limited. Applications are due by 11:59pm PDT [DATE]. Complete the brief application here. Successful applicants will be notified by [DATE].

Contact for further information: [EMAIL]

[SALUTATION]

Adjudication Process

1. Consider having a competitive application process, see Appendix A for our application questions.
2. Download applications from application tool (we used Survey Monkey).
3. Sort Applicants according to your key target audience indicators — for us that was by career stage: Post-Doc, PhD, Masters. Post-Docs were a priority so we reviewed their applications first for any concerns (e.g. not available for full session), then accepted all.
4. Create a blind adjudication ranking file with application data.
5. Based on your rubric, rank each application. Our rubric was as follows:
 - a. Research statement: may contribute to equity, diversity, inclusion, and anti-racism; is research focused (not general interest), and is being done by the participant.** One point was given for having each of the following: Equity; Clear Research Focus; Personal Engagement with Research
 - b. Clearly articulated reasons for participating and demonstrate some understanding of the program.** One point was given for each of the following: Understanding the Program; Equity, Diversity, and Inclusion
 - c. Scoring Guide.** Total of 5 points available. Two reviewers, where there was discrepancies scoring was reviewed.
6. Top applicants are selected, then reviewed by faculty, an effort is made to include participants from all faculties.
7. An additional top 5 participants selected for the waitlist.

RMP Goals and Objectives

AIM: Grow participants' skills to communicate research beyond traditional scholarly and scientific outlets and increase their potential for policy engagement and impact

STRATEGY: create an opportunity for graduate students and post-doctoral fellows across disciplines to connect with each other and hear real voices and stories of policy and politics while learning skills for communicating their research for impact.

Learning objectives

By the end of the week, RMP@SFU participants will be able to:

1. Understand policy landscape and opportunities for influencing policy.
2. Explain how to approach writing for policy and how it differs from other forms of academic writing.
3. Skills for connecting to stakeholders.
4. Present research in a more accessible and engaging manner to policy makers and the media.

See the [summary explainer documents](#) from the four workshop days from 2021 to get a sense of the learning objectives and content for each of the learning days.

Program Schedule Template

	Monday Who, what, when, where is policy?	Tuesday Connecting with your audience	Wednesday Writing for policy makers	Thursday Getting the media involved	Friday Celebration of Learning
9:00	Introduction	Welcome	Welcome	Welcome	Welcome
9:15	Elder Welcome	Assignment Review	Assignment Review	Assignment Review	Assignment Review
9:30	Opening Remarks	Faculty Lead - lesson	Faculty Lead - lesson	Faculty Lead - lesson	Presentations: 3 breakout rooms 2 min presentation 7 min feedback 5 students
9:45	Faculty Lead - lesson				
10:00					
10:15		Break	Break	Break	Break
10:30	Break				
10:45	Policy Presenter	Policy Presenter	Policy Presenter	Policy Presenter	Presentations Back to the same 3 breakout rooms Remaining 5 present/feedback
11:00					
11:15					
11:30	Summarize & assign HW	Summarize & assign HW	Summarize & assign HW	Summarize & assign HW	Closing Remarks
11:45					
12:00	wrap up	wrap up	wrap up	wrap up	Feedback and next steps

Engagement Strategies

1. Requesting a commitment upfront to the whole session in the acceptance response
2. Sending, by mail, a collection of gifts (swag bag) to all participants just prior to the session
3. Considering EDI in all aspects of planning (presenters, swag bag contents, materials, accommodations, accessibility of organizers)
4. Hosting a short orientation session for introductions, alignment, build familiarity with tools, answer technical questions, encourage use of Canvas, the previous week
5. Welcome information-package with all the details of the summer institute (links, tools, schedules) and tips for Zoom self-care
6. Using many features in Canvas including introductions, ensuring team partook
7. Daily check-in/warm up activities (e.g. mood meter memes, rapid networking)
8. Daily review of what works/what doesn't rapid feedback, and responding to issues that could be addressed immediately (e.g. more breaks)
9. Diverse and dynamic speakers - perspectives, experience, mix of policy and academic, age, positionality
10. Daily feedback on work
11. Having a dedicated team member to address technical issues or other administrative requests throughout the week
12. Requirement to present their work on the last day

Evaluation Tools

We used three tools for evaluation. Our evaluation was guided and informed by [Matter of Focus](#) approach and tools.

1. We used daily check-ins as a means to capture in the moment experience and to respond to any issues that were emerging that participants did not feel comfortable asking us directly. Daily check-in tool was informed by the [Matter of Focus Quick Feedback Form](#)
2. We used surveys at the end of the week and 6-mos post event to assess process, learning, and use. Sample surveys in Appendix B and C.
3. The team met at the end of day five and together completed the [Matter of Focus Reflective Impact Log](#)

We also collected informal feedback (emails, tweets, comments) from presenters, facilitators, and participants and tracked media engagement activities using our institutional tracking tool.

References

[1] <https://theconversation.com/politicians-and-scientists-need-strong-connections-during-the-coronavirus-crisis-and-beyond-136482>;

[2] Shiffman, D. S. (2020). Recreational shark fishing in Florida: How research and strategic science communication helped to change policy. *Con Sci Prac*, 2(4), 1–5;

[3] Fischhoff, B. (2013). The sciences of science communication. *Proceed Natl Acad of Sciences USA* 110(3), 14033–14039;

[4] Otten, J. J., Dodson, E. A., Fleischhacker, S., Siddiqi, S., & Quinn, E. L. (2015). Getting Research to the Policy Table: A Qualitative Study With Public Health Researchers on Engaging With Policy Makers. *Prevent Chron Dis*, 12, 140546;

[5] Lewandowsky, S., Ecker, U. K. H., & Cook, J. (2017). Beyond Misinformation: Understanding and Coping with the “Post-Truth” Era. *J Appl Res in Mem & Cogn*, 6(4), 353–369;

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Appendix A: Example Application Form

Thank you for your interest in RMP@SFU. To ensure there is sufficient opportunity for feedback, connection, and engaged learning, the cohort will be limited to 30 participants. Your application will be assessed based on eligibility, stage of program (later stage will be prioritized), and your statement of interest.

Eligibility:

- SFU Postdoctoral Fellow or Research Associate
- SFU Doctoral student
- SFU Masters student

Participation is free! To ensure you maximize the benefits of the institute--skill building, cohort connections, and policy networking--you need to attend all five days July 18-22, 9:00am - 12:30pm. In addition, each day there will be a post-session learning activity to complete. The daily activities are designed to help get you started with communicating your research to policy makers.

We are able to offer financial support to students, if needed, to ensure reliable internet access during the week long session. If selected, you will be considered a Fellow of RMP@SFU and receive a certificate of completion. This can be included on your CV.

We encourage and will provide priority to people who identify as women, 2SLGBTQ+ people, and/or those from equity deserving groups including Black, Indigenous, People(s) of Colour, neurodiverse, and disabled people.

Personal information collection notice

The information on this form is collected under the authority of the University Act (R.S.B.C. 1996, c.468). It is related directly to and needed by the University for services provided by the SFU Knowledge Mobilization Hub. The information will be used to evaluate your application. If you have any questions about the collection, use and disclosure of this information please contact Dr. Lupin Battersby, lupin_battersby@sfu.ca.

Application Deadline: 11:59 PDT May 16, 2022

* 1. First and Last Name

* 2. Pronouns

* 3. Email address

* 4. Faculty (e.g. Faculty of Arts and Social Sciences)

* 5. Department, School, or Program (if applicable; e.g. Department of Geography)

* 6. Disciplinary focus (e.g. Indigenous reproductive health care)

* 7. Please select your current enrolment status

Postdoctoral Researcher

PhD Student

Masters Student

Other (please specify)

* 8. What year of your graduate program are you enrolled in? Or, for how many years have you been a Postdoctoral Fellow or Research Associate at SFU?

* 9. Briefly describe your research. (max 100 words)

* 10. What do you hope to get out of your participation in RMP@SFU? (max 100 words)

11. (OPTIONAL) If you are in an equity deserving group or if there are other factors we should consider in evaluating your application, please share this information here:

* 12. I am available for all the sessions July 18-22, 2022 from 9am-12:30pm

Yes

No

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Appendix B: Example Evaluation Survey

1. As a result of attending RMP@SFU, I have a good understanding of how policy writing differs from academic writing.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

2. As a result of attending RMP@SFU, I have developed portfolio of work to share.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

3. As a result of attending RMP@SFU, I know how to make my research more accessible to the media.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

4. To what extent was RMP@SFU useful to you?

Very useful

Useful

Neutral

Not useful

Not relevant

5. I feel overall that the content covered in the workshop was appropriate for the time allotted.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

6. The RMP@SFU Summer Institute met my expectations.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

7. I felt comfortable asking questions and participating.

Strongly agree
Agree
Neither agree nor disagree

Disagree
Strongly disagree

8. The workload was manageable.

Strongly agree
Agree
Neither agree nor disagree

Disagree
Strongly disagree

9. I liked the mix of teaching and policy presenters.

Strongly agree
Agree
Neither agree nor disagree

Disagree
Strongly disagree

10. I would have preferred...

4 sessions spread over the semester
once a week for a month
a week long intensive

11. In the future, I would prefer...

In-person
Online
Blended version of in-person and online

12. After RMP@SFU, I feel ready to apply what I have learned.

Strongly agree
Agree
Neither agree nor disagree

Disagree
Strongly disagree

13. I met at least one new person that I expect to follow up or stay in touch with after the RMP@SFU Summer Institute.

Strongly agree
Agree
Neither agree nor disagree

Disagree
Strongly disagree

14. Thanks for taking the time to participate in the first RMP@SFU Summer Institute. In order to continue to improve the event, we welcome your thoughts, comments, and suggestions.

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Appendix C: Example 6-months Post Event Survey

We've Missed You!

We are following up on your experience attending RMP@SFU last summer so we can determine if the experience was valuable beyond the week long session. Complete the survey and we will send you an RMP@SFU water bottle as a token of our appreciation. Responses are anonymous, and may be used in our reporting.

Completing this survey should take no more than 3 minutes. Thank you!

* 1. I have used something that I learned at RMP@SFU over the last 6 months.

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

* 2. I have shared something that I learned during RMP@SFU with peers or other scholars.

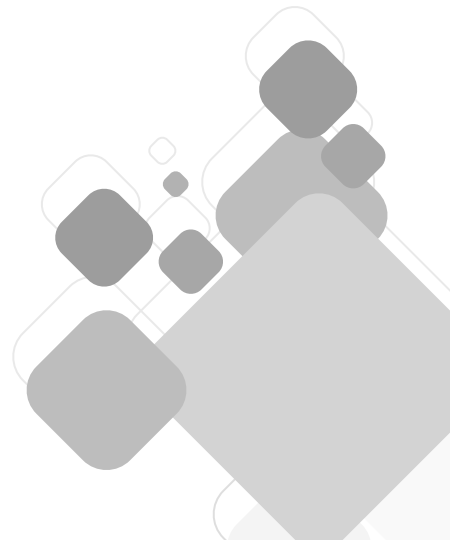
Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree



We've Missed You!

* 3. Since attending RMP@SFU I have done the following activities (select all that apply)

- I spoke to my supervisor or team about lessons learned at RMP@SFU
- Reached out to presenters, other Fellows, or the KM Hub team
- Developed key messages
- Used a readability tool to improve the accessibility of a piece of writing
- Engaged with the media
- Wrote a policy brief
- Connected with a decision-maker
- Attended MLA/MP office hours
- Started using social media for my research
- Mapped the policy landscape
- Created an empathy map
- Created a stakeholder power map
- Wrote a blog post
- Submitted a pitch to the Conversation Canada
- Submitted an Op-Ed
- Other (please specify)

4. If you are comfortable please share details and/or a link to outputs you have created or been involved in (e.g. blog post, media interview, Twitter post)

* 5. How did attending RMP@SFU influence your research approach, research goals, and/or career aspirations?

* 6. I would recommend RMP@SFU to my peers.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

7. Please share any other comments you have below: