Canadian Health Services Research **Foundation**
Fondation canadienne de la recherche sur les services de santé

Exchange Note I

Making “linkage and exchange” work

How to organize a successful meeting between researchers and decision makers

At a glance

Always remember these fundamental elements

❑ Purpose ❑ Value ❑ Interaction ❑ Content ❑ Experience

Before the event

❑ Keep the topic area manageable and have a clear goal in mind.

❑ Choose timely and relevant themes.

❑ Do not be afraid to keep your numbers small or limit participation.

❑ Invite the right people: researchers skilled at communicating with diverse audiences and using plain language; decision makers actively engaged in the topic of the exchange. Most importantly, invite people ready and willing to collaborate.

❑ Talk to presenters/participants before the event to ensure they are not merely presenting their own point of view or research findings; rather, they must offer a window into a bigger world of ideas and possibilities.

❑ Preparatory materials should be succinct, to the point, and distributed far enough ahead of time to be fully reviewed by the recipients.

❑ To facilitate in-depth discussions, collect input on specific issues from invitees, then synthesize and share with participants prior to the event.

❑ To encourage productive networking, prepare briefing materials that include biographies, photos, and other relevant information about attendees and participants.

❑ Location can have a significant impact on a meeting. Consider where participants are travelling from and whether the location is appropriate to the issue being discussed and for minimizing time away from home. Choosing settings that feel more “personal” can have a strong, positive impact.

During the event

❑ Encourage decision makers to set the agenda by presenting their issues first.

❑ Encourage researchers to “exchange with” decision makers rather than “talk at” them.

❑ Actively facilitate connections among participants through structured activities and targeted introductions throughout the event.

❑ Discussions should follow a policy of non-attribution to preserve privacy and encourage a safe space for interaction.

❑ Always offer ample networking periods during lunchtime and breaks.

❑ Consider added touches, like specialty or local treats such as a cappuccino bar.

Next steps

❑ Take the time to collect and summarize key messages.

❑ Evaluate — Did you meet your goals? Did the participants get what they came for?

❑ Take advantage of positive momentum at the end of the meeting to discuss clear action items and realistic next steps — then be sure to **follow through!**

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Making "linkage and exchange" work

How to organize a successful meeting between researchers and decision makers

As any professional event planner can tell you, the key to holding a successful meeting is to make it look seamless. But timing and logistics are only part of the equation when it comes to bringing together people from different worlds to exchange issues and ideas.

There are multiple ways to plan a successful "linkage and exchange" event between researchers and the people who manage healthcare and make health policy. It takes a lot of planning to connect diverse groups who are authorities in their own domain and have issues and concerns specific to their area of expertise.

WHERE'S THE VALUE?
Consider whether a face-to-face meeting is the best way to reach your goal. Is the timing right and is the topic relevant to engage participants?

When a host is holding an event because they think they *should* rather than because it is appropriate and needed, participants can sense it. The event will then be defined by an agenda that is not reflective of the issues or the people at the table.

Before the event: Getting started

Keep the goal in focus

Knowing where you want to be at the end of the meeting is probably one of the most important parts of planning a linkage and exchange event. Having a clear goal in mind will define other aspects of your planning, such as identifying attendees, designing the structure of the event, choosing the location, and so on. Your goal should outline the value of the exchange for all stakeholders involved, from the organizers to the participants and event sponsors. Keep the goal at the forefront throughout the planning, execution, and follow-through stages of the exchange. Stay on track, but also have the flexibility to listen and respond to participants throughout the process.

Setting the agenda

Set an agenda that reflects what you hope to accomplish and keep it simple — trying to accomplish too much can threaten the flow of the meeting, especially when dealing with complex issues. Ask yourself: Are you talking about designing a specific policy? Do you want to explore particular research findings?

The theme should be relevant and timely. The specific topic will further inform who you want to bring to the table and what each person will add to the discussion. Consider engaging your participants prior to the event by sending out a series of questions that will be synthesized and integrated into the agenda. This will help you frame a conversation that is relevant to all parties and will encourage interaction.

Who will be invited to the party?

Bigger is not always better in linkage and exchange. The most important aspect of your invitation list is identifying the right people, not generating the longest guest list. Invite individuals who are eager to collaborate and aware of the key issues.

The best researchers to invite to a linkage and exchange event are ones who are skilled at communicating with diverse audiences outside of academic settings. This means they are comfortable using plain language and can discuss research at a level that understands the listener may have little or no research awareness. Sending in a researcher who focuses on the finer points of methodology or who finds it difficult to talk about research without using jargon can often impair proceedings before they even begin.

Decision makers should be limited to those who are already working in the area being discussed or who are about to delve into it. In general, avoid mixing decision makers from radically different levels of the system.

For example, decision makers who are ground-level operational managers have very different interests and concerns from senior civil servants who make policy decisions. Many individuals will feel most comfortable and will interact to a greater degree with peers, rather than subordinates or supervisors. Exceptions to this rule would arise when the goal of your event is to bridge the gap between various levels of management and policy, or when discussing how to integrate policy at operational levels.

Windows into another domain

Researchers and decision makers need to prepare for and attend the meeting as more than just experts in their own work. They are also seen as experts in their professional field. Researchers can enhance the discussions by making links to other bodies of work they are aware of that can shed light on the issues being raised by decision makers. Researchers need to realize they are providing insights into larger bodies of research, not merely presenting their own findings.

Conversely, decision makers can speak to issues such as upcoming policy challenges that will require research evidence. Ideally, the expertise and experience of each participant adds depth to discussions and enhances the dialogue. Both researchers and decision makers add valuable insights to the research, the issues, and the conversation, regardless of their "official" positions.

Check your stereotypes at the door

Rarely do we enter a situation with a blank slate. Researchers and decision makers often have preconceived notions about each other's work. To have an open discussion, these are best set aside before a linkage and exchange event begins.

Each group would benefit from thinking about how vastly different its work is before attending the meeting. For example, let participants know that they often deal with very different timelines: weeks, days, or hours for decision makers; months and years for researchers. That said, this concept of timeframes also points to a stereotype which we might slowly be leaving behind: decision makers, while still faced with tight deadlines, are considering long-term solutions, and applied researchers are increasingly engaged in research processes that provide ongoing feedback to decision makers. Assigning exercises that get participants to think about some of these diversities can help get all of the players started on the same page. Ideally, when bringing together diverse groups, you may need to bridge gaps between the different

A FRESH POINT OF VIEW

A new perspective can shed new light on an issue that might have lost its spark. Consider bringing in researchers, managers, or policy experts from outside the health sector. Their experiences and knowledge will deepen the level of discussion and introduce innovative ideas into the mix. Keep in mind that it may not always be an appropriate strategy — so be sure to know your audience.

ADDED TOUCHES

The smallest touches often have the biggest impact and make the event stand out as a pleasant, successful experience. Aside from scheduling networking breaks and ensuring long lunches for side discussions, basic issues like the quality, type, and timing of food service are critical to keeping a positive tone.

Healthy food and beverages should always be available. Always make sure there is water on the tables, pens and paper to write with, and consider adding special treats such as stress balls or highlighters, if appropriate. Seating arrangements should be done according to the purpose of the event and the activities that are planned.

cultures before you can engage the participants in specific policy, management, or research issues.

Preparing your guests

One of the reasons linkage and exchange discussions are so beneficial is that people often do not have the time to read and interpret lengthy research articles to get the information they need. Be realistic: preparatory materials should be succinct and to the point (for example, avoid traditional academic articles).

Create briefing materials with a purpose. For instance, to facilitate in-depth discussions, collect input on specific issues from invitees, then synthesize and share it with participants prior to the event. To encourage productive networking, prepare packages that include biographies, photos, and other relevant information to spark interaction.

If possible, distribute the materials to participants at least one weekend ahead of the event. This will give them time to review the briefing material, think about the issues at hand, and obtain any additional information they desire. Avoid distributing material more than two weeks ahead of the event; it has a tendency to be lost or forgotten.

Location, location, location

Location is important. Financial restrictions and ease of travel for both the organizers and participants should be considered. Aside from budgetary restraints, consider: Where are most participants travelling from? What time is the last train or flight out of the area — and are you ending the event in time for people to make it? What is the most accessible location for participants? Is there a venue that is particularly appropriate to the issue being discussed? The physical environment of the locale can have a significant impact. Think about the details such as room size, natural light, ventilation, and other issues that can affect the tone of the meeting.

The venue may be determined by the size of a group — if you have a large group, you may be restricted to a hotel or conference hall. However, there are terrific advantages to limiting the number of participants and choosing a more personal retreat setting to facilitate more open discussion and better relationship-building opportunities. Additionally, venues for large groups should be designed with the ability to have small breakout discussions.

During the event: implementing the details

Getting started

When organizing an event that involves communicating research findings, let the managers and/or policy makers set the agenda by presenting their issues and concerns first. This allows decision makers to identify the principal points that resonate in their work and gives researchers an opportunity to share more details about how their work and knowledge fit into these challenges. A strong facilitator can help keep the conversation on-course (while incorporating flexibility into the discussion when it feels necessary) and ensure that each group is heard and understood. Keep in mind that the same words and phrases can have different meanings to different people. Ask people to explain unusual terms and references to ensure you do not lose confused participants.

Presenting to facilitate discussion

Formal presentations can increase the feeling of distance between researchers and decision makers. Discussions are often far more effective at bringing down barriers and making people feel comfortable. For bigger events where presentations cannot be avoided, it is useful to offer a blend of expert presentations and opportunities for engaging dialogue. If you are setting up discussion tables, think about the seating arrangements to take advantage of expertise and encourage relationship-building.

Time to talk

Structure the activities to encourage conversation — not only formally, but also between sessions. Schedule longer breaks and lunches to allow ample time for people to talk to each other on their own time and absorb the information of the day. This allows participants to get to know each other better and to address issues relevant to their own concerns.

We suggest 20- to 30-minute health breaks in the morning and afternoon and an hour or more for lunch. The organizer plays an important role in facilitating interactions among the participants, both through structured activities and at the breaks as they actively scan the room to help connect the right people. While networking time is important, respecting personal time is also essential — when possible, try to set up a start and finish time that allows participants to attend the workshop with minimal time away from home.

Off the record

People need to feel safe to have a frank discussion about the concerns they have and the barriers they come up against. It is important to create a space that allows participants to have open and honest conversations, and to know what should be kept confidential and what should be shared with the outside world. Follow a modified *Chatham House Rule*[1] when dealing with sensitive or pressing political issues to support dialogue and encourage discussion without risk of reprimand outside of the meeting space.

Evaluation

Include time for participants to provide written and verbal feedback about their experience, including what they would like to see happen next. It is also very important to allow for confidential/anonymous feedback. Ensure that people feel comfortable sharing their thoughts, even criticism, by offering

BE AN ENGAGED HOST

The organizer plays a critical role in facilitating interactions among the participants, both through structured activities and at the breaks. It is important that organizers are prepared to host the event: know your participants; actively scan the room to help connect the right people at the right moment; and create occasions throughout the event for participants to meet and exchange ideas.

1 Chatham House Rule: “When a meeting, or part there of, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed; nor may it be mentioned that the information was received at a meeting of the Institute.” (http://en.wikipedia.org/wiki/Chatham_House_Rule)

a box or unsupervised area where they can fill out and drop off evaluation forms. This information allows organizers to evaluate how the meeting went and identify opportunities for improvement. Take the time to read and learn from the information shared. If possible, follow up with a phone call to a sample of participants to get additional input.

Next steps: Now what?

As the end of a meeting comes into view, there is always a sense of "What do we do now?" Take advantage of the momentum and be prepared to discuss next steps. There are many ways to follow up a linkage and exchange event. The simplest of these would be to write a report on the meeting, which can be an excellent tool for people unable to attend to engage in the issues. Planning subsequent meetings or stimulating a network could also follow suit.

Be open to different types of follow-up. However, do not make promises you cannot keep — think about what you can reasonably do and take action to follow through on next steps.

Suggested reading

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