**2020 Online KT Conference:**

**Social Media Strategies for Knowledge Translation**

*Panel: How to Utilize Crowdsourcing and Social Media Tools to Engage Stakeholders*

Katia Albanese and Hope Adler

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>> ANN OUTLAW: Thank you, so much Hope and Katia. I love the examples that you shared. They were they were very timely and interesting. And thank you all to all the attendees who submitted questions. We will get to those in just a second. First, I would like to introduce our reactors for today and invite them to turn on their web cams. Joining us is Denise Henrikson. She is from the Social Policy Research Associates where she collaborates to develop training and technical assistance tools for our partners.

>> DENISE HENRIKSON: Hello. Thank you very much.

>> ANN OUTLAW: Thank you.

>> DENISE HENRIKSON: Thanks, everybody. It's really great to see all the interest here in the topic. While social policy research doesn't have an active social media presence, a lot of the groups that we do and one that I wanted to talk about in particular is we are working on a project right now to increase participation in apprentorship programs by veterans with service-connected disabilities. One of the ways that has been really effective for recruiting applicants for that program is through social media. Not only the agencies themselves, but the partnering organizations, sponsoring organizations and businesses. And to get the word out, it used to be before Covid most of the outreach happened through job fairs and career fairs, but because that has moved online, there has been this increase in ways to spread the word about it that has really had a positive impact on the people who are accessing that information and able to apply for those programs. So social media has been a really great tool. Like Katia and Hope were talking about, it's not just the agency or the particular organization that has the opportunity, but there is all the partnering organizations that can help amplify that. That has been a really effective strategy.

>> ANN OUTLAW: Definitely, the leveraging and amplifying is a strategy Hope and Katia spoke about and it is important. I would like to get to one question from a participant pretty quickly. I think you Katia and Hope were able to address most of those, but one question that came in is ‑‑ can these strategies be applied to research using social media? Such as research projects when they define their questions of the research they will do or collecting data. Can you say how crowd sourcing would be used in those types of projects?

>> DENISE HENRIKSON: Is that question for me?

>> ANN OUTLAW: For Hope or Katia. I can't hear you Katia.

>> HOPE ADLER: I can jump in. You can go Katia, do you have something to say?

>> KATIA ALBANESE: I was going to say ‑‑ sorry about that. I was unmuting the wrong thing. I think it's very applicable. I'm not sure if we were clear in communicating that. Research, you are defining a problem and coming up with your research question. Even starting with crowd sourcing your research question. In research, you are collecting information from individuals. How do you collect that information is just using a tool to do that in a different way? And allowing others to be part of that process as well. Hope was talking a little about surveying. Surveying is definitely a common strategy in research where you are just pulling feedback.

But this is more than just a one‑way input. This is where you are really trying to have a little bit more of a conversation of more in depth engagement with the person. And I think in research it's very easily applicable and I wish I could come up with a quick example.

>> HOPE ADLER: I was thinking we had done a bunch of different types of dialogues. One of the kinds we have done is identifying barriers, right? So where does the problem lay? I mean, I think this terms of framing your research question, where are the pain points? So we have done a lot of dialogue kind of not knowing exactly what ‑‑ knowing there is a problem, but not knowing exactly where it is or how to frame it. We have done several where we have done more of like a gap analysis like where is the problem?

>> ANN OUTLAW: That is a great example there. I would like to invite the other reactors. Erica Machulak, she’s the founder of Hikma Strategies an organization that helps scholars and specialists bring ideas to new context through collaboration. Our final reactor is Jerry Smith. He is the marketing and business development manager from the institute on Community Integration at the University of Minnesota, a NIDILRR grantee. So welcome both.

Erica, I’ll ask you this question now. We heard about leveraging partner networks to host online dialogues. At Hikma Strategies you help researchers share their work outside of their usual avenues through developing communication campaigns and capitalizing on existing and new collaborations. So, how would you recommend using partner networks to share their research?

>> ERICA MACHULAK: Thank you for that question. And thank you Katia and Hope for your presentation. What resonated with me as well, when I talk to researchers about their communication strategies they emphasize three things. One is what is the goal? What is it that you actually want to communicate and achieve by communicating? What could the target audience which is something that Katia talked about in the steps today. Who exactly do you want to reach out to and what are the channels those people are actually using to communicate already? Where are they going for their information? Katia had a great quote which was it's just not true that if you build it, they will come. You really need to meet people where they are at, which I know is something we are talking about later.

The other piece I would add to that is many researchers use their social media kind of sporadically to post about things when they have done something and disappear for a while. I have been guilty of that myself. You get busy. It's totally understandable.

If you really want to use social media to maintain relationships and have reciprocity with other partners, where your amplifying each other’s voices, it's useful to actually take advantage of the position that you have and the channels you have to amplify the voices you have for your stakeholders ‑‑ even when you don't have something in particular about your research findings to promote. I have talked to many faculty members during Covid who had research projects planned and other organizational partners didn't have the capacity to pursue those things. But we say to say hey our partner organization needs partners right now or is doing this great community‑based event and build the trust and keep the conversation going in a reciprocal way even in the moments that you don't have a new finding that is hot off the presses.

>> ANN OUTLAW: Thank you. Those are great insights. Jerry, let's hear from you now. I think this question was coming in from the participants as well. When Hope and Katia spoke about the importance of research, I would like to hear how as the marketing and business development manager at ICI, what outreach strategies did you use to solicit feedback from stakeholders, and have you targeted your outreach to specific groups? We can't hear you, Jerry. Are you muted on your headset? Shoshana, do you have some advice for Jerry?

>> SHOSHANA RABINOVSKY: Jerry, let me chat you and we will work it out.

>> ANN OUTLAW: Definitely. I'll come back to you, Jerry. I saw a question coming from the chat about vocational rehabilitation. Let me go back up. VR or vocational rehabilitation is required to perform comprehensive state‑wide needs assessment at least every three years. Have you seen any VR agencies that have used this method and I see a few answers have come in? I'm sorry if I'm not up to date. But Katia, do you have something you would like to share with the audience?

>> KATIA ALBANESE: As far as our e-policy works we have representatives of VR agencies participate, provide ideas and comments to get the word out. As far as using crowd sourcing particularly for the VR agency, personally, I have not worked with a VR agency through policy work or otherwise. Although, it does sound like it would be a great tool for reaching stakeholders.

So, I mean, I definitely think that is great thinking and something that maybe some of the agencies might want to pursue. Again, understanding the budget is sometimes an issue. There are tools that are free if you wanted to look into it. It's a matter of making sure that ‑‑

>> HOPE ADLER: It reminds me of the dialogue we did for St. Lucie County in Florida. We did some PA for a small county in Florida who was looking to justify or figure out how they could do their transportation, their paratransit better. So they did a short little dialogue and they found they were only offering services during the week and they found that people needed it on the weekend to go to grocery stores and doctor's appointments in the evening.

They used it to try to get more grant funding for their paratransit to address some needs that weren't being addressed by their current paratransit. Similar just for a small need to a community. They did a lot of outreach to a lot of people who may not have access. They did it in the libraries. They put up posters in the libraries were computers were accessible to get people to participate and share how they needed paratransit services.

>> JERRY SMITH: Can you hear me now?

>> ANN OUTLAW: We sure can. Thank you Hope and Katia, those were great answers. Let's switch and go back, Jerry. What strategies do you use to elicit feedback from stakeholders and perhaps those hard to have reach ones?

>> JERRY SMITH: We have done many different things. There are many different projects and many different groups. We certainly use social media. We use e‑mail campaigns. We use a lot of personal connections. We leverage our partnerships. We used to do a lot of in‑person presentations and meeting people in their communities. So in many ways, we did everything well and right, and we are very engaged. As Covid shows us, we have to get smarter with virtual work. I was fascinated about by this presentation because the model of crowd sourcing and having a tool to do it brought everything together. When we are trying to reach self‑advocates we use a different approach. We embrace knowledge translation seriously and get away from a lot of our text. We make sure our content is usable and understood. But that is one audience.

How to really engage ‑‑ how to engage people meaningfully, I don't think we have done it in an integrated way as you have in of this presentation. We did a survey on Covid and professionals. It was a survey. It was a standard kind of thing. We had nine thousand people respond. It was tremendously successful, but we didn't have that generating of ideas and the back and forth. It could have been much richer. I would like to turn it back to the presenters and ask, how did you arrive at this integrated approach and find the specific tool, this IdeaScale that allowed you bring together the ideation and getting information that you can analyze and disseminate again?

>> KATIA ALBANESE: I think Hope and I can tackle this one together. Thank you. A few different things. You know, I think first, the department of labor employment policy, there was definitely the desire to reach more people with disabilities in the policy making process. And understanding that the way it was being done was not ‑‑ was not allowing for that, logistic wise and cost wise and everything. And the idea of bringing people around the table, that conversation came up at the same time. All when virtual engagement became a thing for the federal government and open government initiatives started. There was definitely a look forward for the agency to figure out ways and utilize these tools and for inclusive policy making. I think that has already been on one of the one of the main reasons for taking this or utilizing the IdeaScale platform.

We were very lucky to ‑‑ sorry, go ahead.

>> HOPE ADLER: I was going to say, like what you said. I felt like two things came together like this vision of ODEP to of different ways to do listening sessions instead of traveling around the country where you were only able to have a certain amount of people in the room and people who could get there. A new way of doing things along with the new push to make sure the new social media tools were accessible. I give a lot of credit to Mike Reardon who had this vision and meeting representatives from different technology companies who wanted help in making sure their platforms were acceptable. Working with IdeaScale was very open in trying to have knowledge in making sure what they were doing was acceptable to everyone. So, it kind of became a partnership.

>> KATIA ALBANESE: Exactly. And also, the listening sessions, one other issue with them was the one sidedness. And the lack of these like ‑‑ the back and forth, the conversation. So it just sort of fell naturally into this. It was a way to have a more ‑‑ a conversation. A moderated conversation with thousands of people, not just a few dozen. And again, even in listening sessions the one person at a time kind of thing what they thought, but there was no reaction coming from the federal government. This was an opportunity to had that back and forth and that responsiveness.

>> HOPE ADLER: The first dialogue we did was a collaboration between Social Security, HHS, it was hugely successful dialogue and it was a bunch of different agencies working together to support youth transitioning to employment and some of the barriers that existed in federal government.

So, it was also just ‑‑ it was great that the first dialogue had a lot of engagement and support throughout the federal government. So that was a positive experience.

>> KATIA ALBANESE: The reasoning behind that dialogue was there were four agencies, Social Security, HHS, Department of Labor and Department of Education who were supporting youth and young adults in transition. They were redundant programs, their efficiency and funding. They were tasked with identifying those serving that population. Out of it came a whole set of recommendations because they were really overlapping the same stakeholders. So actually asking the stake holders where those were done and where the gaps were and they came up with a set of recommendations that went forward to Congress. I know they are continuing that work since 2013 was carried over.

>> JERRY SMITH: Can I ask one follow up? I think this work makes so much sense on the scale you are doing it. The marketing involved in making those compelling invitations has to be pretty sophisticated I'm thinking. Is it reasonable that projects that maybe have a three year grab to try to reach a couple hundred people can have the same approach and be successful? Can they work on a smaller scale? We know it works on a larger scale.

>> HOPE ADLER: You were good. It was working.

>> KATIA ALBANESE: We had very small dialogues and very large. We had dialogues with maybe 20 participants. It definitely can work for smaller audiences. It's a matter of resources, too. There are all kinds of product out there that range in price that are, I think, some small, some large and there are tools out there as well. But, yes, as far as the information and the knowledge that is created and that is definitely can serve a small group just as much as a large group.

>> HOPE ADLER: We have done some dialogue where we invited a large group to help to come up with ideas and then we refined them down and had people comment, you know a smaller group comment on the end result. We would come up with these five ideas and have people just comment and vote on those five ideas.

So we have used it different ways. We used it without voting. We have used it where the ideas were already put into the dialogue and which asked people to come in and make comments on ideas that have already been prepopulated.

>> JERRY SMITH: Thank you.

>> ANN OUTLAW: I think those are very great questions, Jerry, and answers Katia and Hope as well. One question about platforms. You mentioned you use a crowd sourcing platform in Twitter and others are talking about Facebook. There are other platforms that you see are going to be part of these online dialogues in the future?

>> KATIA ALBANESE: There are ‑‑ I even have a list somewhere around me. Crowd sourcing has become more common. Now there are crowd sourcing platforms for specific use. There is one for graphic design and sort of like more marketing to be used.

>> HOPE ADLER: And there are some town hall times targeted to more political events.

>> KATIA ALBANESE: Right. And there is also crowd funding. Many of you saw during Covid‑19. It's for crowd sourcing but for funds.

>> HOPE ADLER: Challenges. We have seen quite a bit of challenges lately as well. We try to pick a winner.

>> KATIA ALBANESE: Pick a winner. Sometimes there is a financial prize associated with it and sometimes there are not. There are developer challenges where they are trying to come up with like a technology for lack of a better description. But in an app or some kind of Covid challenge. But now the challenge base moved into just general ideas and pilot programs they are like mini grants. But as far as other ‑‑ like ‑‑ I need to run through a list of them because there are almost always new ones coming up for your needs.

I would strongly recommend you do your homework. IdeaScale, they serve the federal government. They have mostly federal clients. So for our needs they are able to meet the criteria for security and accessibility and you know, they are usually for federal and foreign governments to purchase or use. But there are lots of others. It's up to you to do some homework and read about them and checkout their ‑‑ you know who is using them and their success stories. You can reach out to some of their customers to see how they like ‑‑ you can crowd source them.

>> ANN OUTLAW: Find them where they are at as well. Figure out where your audience is. Your target audiences are living online and go there. I think this has been a really wonderful discussion. We have a couple more minutes left. Jerry, Denise or Erica do you have any further questions you would like to share with Hope or Katia?

>> ERICA MACHULAK: I have one. Hope and Katia I was interested in that you said inviting moderators and guests to your discussions, particularly the Twitter discussions. I was wondering if you talk about the preparation and organic discussion that presents. What does that look like with your guests and facilitators?

>> KATIA ALBANESE: So, when you are talking specifically about the chat? Is that what your question is about?

>> ERICA MACHULAK: I suppose all of them, but the Twitter one was really interesting.

>> KATIA ALBANESE: You want to put some structure into engagement. The flexibility ‑‑ we can't help ourselves even during the presentation we were answering questions in the chat. It's just the way we work is in real time and just being moving toward the conversation to where the conversation is going rather than trying to dictate it. We do this with all of this. We create a shell and the shell is the structure ‑‑ for example, the Twitter chat, it's Q&A.

So, our presenters or our featured guests are aware of the questions they will be asked. It's hard to control because right away you have your Twitter sphere chiming in and they are answering the questions and asking additional questions. We facilitate that conversation from the back end. To date, we had awesome participants who are very much aware of that is how it works and they are ready to respond to chat. Of course, if they are not comfortable answering something, they don't need to.

One of the things we do mention in both places. If a question isn't answered, we will go back and answer it later. So sometimes, especially working on behalf of the federal government in collaboration with other agencies, they may not want to post a response right away and just ensure right away and make sure it's accurate and appropriate before posting.

>> HOPE ADLER: I think the scripting came about to make people comfortable, right? Because I think a lot of people who participated in our Twitter chats as features guests have never tweeted ‑‑ have never done anything like that before. When they can see on a piece of paper this is how it's going to go, we are going to tweet this question. You are going to tweet this response. It makes everyone more comfortable. I think then there are in there. Initially, when we started doing the Twitter chats we were all in the same room. We would be in the room with the three our featured guests and they would see all of this happening on the screen. We thought, this isn't so hard, we can do this and get very excited.

It takes something that maybe seeing something esoteric or scary and putting it on paper and saying this is how it's going to go, made everyone, including as Katia mentioned we work for the federal government. So, making sure everybody is comfortable there isn't going to be any rogue things going on.

>> KATIA ALBANESE: That is a great point. That goes to the moderators as well. They get nervous how they should respond. As part of our templates they have suggested responses. They feel comfortable they can just post thank you for your idea and helping structure a follow up question. But as Hope said, it's very natural. Just like you would hear in a presentation, you write your presentation or your talking points. But as soon as the conversation happens, you take over and you feel natural and you respond. That is the same thing in the dialogue as well as moderator. Everybody likes that structure to feel comfortable.

>> HOPE ADLER: We had people along who you think would never do Twitter or a dialogue. We had a lot of people after they have seen that and participated be like on board. We work for an agency that is comfortable doing that in person, on paper, just not a huge social media comfortable place.

I think after taking these steps and doing it, I think they feel very comfortable and we have someone new on the call for the next dialogue every time. Like, oh yeah, I want to do one of these. I think it's part of the process but it's something that you can do with people who maybe aren't so comfortable with social media. Thing is something they can manage and feel comfortable with.

>> ANN OUTLAW: Thank you Hope and Katia for your presentation today. Our reactors, Erica and Denise and Jerry and all the questions that have come in through the chat box. Really great conversation today. Thank you. We will see you in a little bit.