

QES-AS Projects Workshop

QES-AS Projects Workshop
Strengthening partnerships and collaboration across QES-AS projects

May 22-23, 2019
Ryerson University, Oakham Lounge
2nd floor, 63 Gould St., Toronto, ON, Canada



From May 22-23rd, 2019, Universities Canada, with financial support from the International Development Research Centre (IDRC) and the Social Sciences and Humanities Research Council (SSHRC), organized and hosted the inaugural Canadian Queen Elizabeth II Diamond Jubilee Scholarships – Advanced Scholars Program (QES-AS) Workshop.

The event, held in Toronto at Ryerson University, gathered project leads and scholars from 19 member institutions from 6 provinces, with QES-AS funded researchers from Canada and 20 low- and middle-income countries (LMICs).

The workshop offered an opportunity to discuss topics such as networking across boundaries, cultivating emerging leaders, definitions of project success, as well as knowledge transfer and capacity building. The following provides a brief summary of some of the themes that emerged from the conversations held over the course of the workshop.

QES-AS Projects Workshop

Day 1 – Wednesday, May 22nd, 2019

Workshop for scholars and project leads

Community engagement through the QES program

Community Foundations of Canada (CFC) representative, Dana Decent, provided an overview of CFC's role in the QES program. She touched on several examples of ways QEScholars had engaged with their communities through CFC or their local CF, sharing snapshots of their experiences with programs such as Students on Ice and Climate Guides.

Networking across boundaries: Leveraging the QES-AS network to develop and strengthen connections

The first thematic focus session was led by: Solina Richter, PI/Professor, University of Alberta; Robert Kinlocke, Post-doctoral researcher, University of the West Indies, at MONA, Jamaica (at Wilfrid Laurier University); Onita Basu, PI/Professor, Carleton University; and, Theodora Aryee, Doctoral Researcher, University of Ghana, Ghana (at Carleton University). The following are some of the key lessons learned mentioned during the session discussion.

Participants emphasized the importance of starting the relationship-development process with the perspective that it will be a long-term investment. Session leaders shared some key factors to consider in starting a new relationship:

- Ensuring all actors have ownership over the relationship-building process, focus on the decolonization of practices
- Creating a platform for institutions to develop durable and sustainable relationships, beyond the individuals involved
- Identifying and building on common platforms/goals, shared understandings
- Looking for envelopes to work under: taking a multidisciplinary lens/approach that provides opportunities for network development and individual growth
- Focusing on ways to leverage informal networks to engage in more formal networks and partnerships
- Investing in strong orientation and pre-departure sessions that also facilitate network development and strengthen cohort connections throughout the QES-AS program

Challenges in network building, maintenance, and strengthening were also highlighted:

- The time commitment necessary to sustain partnerships and relationships
- The physical proximity of (or distance between) scholars and partners
- The need to be adaptable to changing situations and community needs (e.g. the Ottawa floods impact on the timing and focus of community meetings)
- Institutional buy-in and engagement with QES projects and their scholars
- Communication challenges with technology, time differences, and language differences

Tangible examples projects are using to develop networks with scholars and partner institutions:

- Cohort models, where a group of scholars arrive and depart at the same time
- Connecting the QES project with existing networks (using QES-AS funding to support scholars within that network)
- Fostering collaborative workspaces and workshops (e.g. writing workshops, research technology introductory sessions, classroom engagement seminars, summer institutes) that focus on individual capacity building (taking a 'menu approach'), supporting networking development, and fostering a collaborative atmosphere

QES-AS Projects Workshop

- Facilitating informal networking sessions, through food (e.g. coffee chats, group meals) to build connections between researchers and potential mentors
- Developing ‘training the trainer’ models so that scholars can bring workshops back to their home institutions
- Organizing mobility programs and workshops during less demanding months (such as April - June in Canada)
- Connecting with other departments (both faculty and administrative bodies) to gain support for the scholars through highlighting benefits such as the cowriting of grant applications, mentorship opportunities, etc.
- Sharing project information and outputs on social media, in reports, faculty meetings, and public forums
- Connecting with government bodies and partner agencies early in the research development process to encourage updates and larger scale implementation of research projects or results
- Having an email list of projects that are working on similar topics and in similar communities (i.e. subgroups based on research themes and countries or communities where scholars are from/working)
- Identifying and encouraging catalysts for networking, such as:
 - o Data sharing
 - o Disseminating analyses and insights gained from research, through presentations and conferences
 - o Community engagement, working with local groups to understand how issues play out in different contexts

Two opportunities for further discussions, on strengthening and developing networks, included focusing on mentorship development and ways to use social media as a tool to produce and disseminate knowledge in a way that is palatable, concise, and relevant for public consumption.

World Café - Increasing the capacity of partners through research

This session allowed for smaller group discussions (of up to ten people) on a rotational basis to discuss eight key questions that had been relayed to the Universities Canada QES team by QES-AS project leads.

Table 1: Knowledge transfer/translation – what does this look like?

In the context of the QES program, the definition of terms *knowledge transfer and translation* have been purposefully left open so each institution can define the terms in the way that makes the most sense for their respective projects. QES-AS projects each engage in knowledge mobilization activities in vastly different ways depending on their project themes, the researchers involved, and the way their project is structured. Examples of knowledge transfer and translation activities highlighted by the workshop participants include:

- Translating and adapting research findings to suit different contexts, languages, and stakeholders through policy briefs, workshops, meetings, tool kits, and communications plans for practitioners, QES partner organizations, non-academic groups, government lobbying, non-governmental organizations (NGOs), and local governments
- Sharing research activities and findings through various in-person and online platforms such as YouTube, summer institutes, local community groups, training of trainer workshops, etc.
- Sharing information between partners using online forums, workshops, in-person visits, etc. with particular focus on the decolonization of research processes
- Leveraging QES networks to collaborate and disseminate research project findings
- Publishing papers in academic journals
- Broadening research interests through QES-AS presentations

QES-AS Projects Workshop

Table 2: Challenges, risks and best practices in knowledge transfer/translation

Participants were encouraged to share the challenges they experienced in the knowledge mobilization processes they were engaged in. In discussing these challenges, and their associated risks, groups collectively came up with some suggestions on how to address them:

Challenges	Risks	Best practices
Cultural and language differences	<ul style="list-style-type: none"> - Misconceptions - Miscommunication - Scholars experience a negative adjustment process 	<ul style="list-style-type: none"> - Connect scholars with community groups or other scholars from similar language groups - Develop safe(r) spaces for scholars to discuss these challenges
Difference in policy objectives between partners	<ul style="list-style-type: none"> - Delay in implementation 	<ul style="list-style-type: none"> - Developing communication strategies with all partners - Selecting partners with common vision and experience
Practical challenges (such as visas, payments, banking, admin, reporting)	<ul style="list-style-type: none"> - Time investment loss (scholar, administrative, etc.) - Scholars unable to accept the scholarship - Financial loss if the transfers are not done well 	<ul style="list-style-type: none"> - Leveraging existing programs (i.e. Chair programs elsewhere) - Matching funding - Not “babysitting” each scholar but having them accountably report
University level acceptance and confirming letters of invitation	<ul style="list-style-type: none"> - Academic/university partnerships not being effective at macro level - Administrative staff overwhelmed by work involved 	<ul style="list-style-type: none"> - Developing memorandums of understanding (MOUs) for departments within the institution
Changing PIs and countries	<ul style="list-style-type: none"> - Loss of PIs and mentors over time 	<ul style="list-style-type: none"> - Working with units or centres at university to support the various project aspects - Creating MOUs that are active and long term
N/A (no specific challenge linked)	<ul style="list-style-type: none"> - Loss of connectivity after the scholarship is completed 	<ul style="list-style-type: none"> - Creating local alumni QES groups with scheduled meetings (monthly/quarterly) - Connecting with others on <i>QES Connect</i>
Knowledge transfer when returning (e.g. evidence-based practices)	<ul style="list-style-type: none"> - Loss of connectivity, momentum, and knowledge 	<ul style="list-style-type: none"> - Organizing events/platforms with partners - Defining knowledge mobilization plans with partners well in advance - Partnering on monitoring/follow-up activities
N/A (no specific challenge linked)	<ul style="list-style-type: none"> - Scholars not returning to their home institution - Loss of knowledge 	<ul style="list-style-type: none"> - Ensuring community-involved organizations (i.e. stakeholders, government, NGOs, etc.) are involved in communications throughout the research process
Scholars being away for long periods of time; often unable to participate because of family or care work responsibilities	<ul style="list-style-type: none"> - Stress, loss of good candidates - Separating families 	<ul style="list-style-type: none"> - Breaking up scholars’ time abroad into multiple trips (that add up to at least 90 days) - Providing more information on scholarship conditions and requirements
Publication conflicts i.e. authorship between QES local and Canadian supervisors	<ul style="list-style-type: none"> - Loss of a relationship - Conflict between partners 	<ul style="list-style-type: none"> - Developing an agreement early between potential authors

QES-AS Projects Workshop

Table 3: Project lifecycle – opportunities for capacity development and exchange

Participants identified six phases in the project lifecycle: the scoping phase, training activities, project implementation, documentation processes, evaluations, and the identification of future opportunities. The following lists some suggestions participants had for capacity development opportunities throughout these phases:

Scoping and planning phase – projects build capacity in the following areas:

- Communications skills (e.g. language, intercultural communication, use of new technology)
- Faculty supervisor recruitment
- Visa and work permit processes
- Training of trainers models and PI mentorship development
- The creation of platforms for sharing information amongst QES scholars and project institutions
- Collaborative decision-making models for creative problem solving
- Information materials for scholars and institutions about QES (e.g. handbook) and key project information
- Plans on how to capture learning (what should we be focusing on and/or measuring?)

Training and implementation phase – projects build capacity in the following areas:

- Cultural connections and relationships with new communities
- Familiarity with new systems and orientations of new cities, resources (e.g. library, technology, research facilities)
- Platforms to share experiences, grouping projects by themes
- Inter-university collaboration methods or processes
- Mentorship opportunities and the introduction of new audiences to QES and QES-funded research

Documentation, evaluation, and identification of future opportunities – opportunities for capacity strengthening:

- Identification and accessibility of financing after-research activities for the QEScholars (thesis, reports, etc.)
- Platforms to continue sharing amongst the QES network (such as an international conference for QEScholars)
- Online connections, such as encouraging alumni to join *QES Connect*

Table 4: If we had additional resources, what kinds of activities would be beneficial for capacity development of the scholars and institutions?

Participants highlighted the following activities as having a strong potential to benefit the capacity development of scholars and the partner institutions:

Adding a no cost extension to projects so they can finish their respective research projects as a result of:

- Visa delays, ethics approvals timelines, confirmation of partnership agreements (took more time than anticipated)
- Industry involvement, where more time (over 3 months) is needed to finalize scholar's research collaborations

Providing workshops on the following themes:

- Leadership development
- Career skills development (academic writing, CVs, collaboration skills, etc.)
- Community engagement
- Research partnerships
- Capacity building models
- Language training (EN, FR)
- De-colonizing education

QES-AS Projects Workshop

Supporting networking opportunities for researchers

- Hosting conferences or small QES events – at every university, to reflect on learning and capacity built
- Hosting workshops with a thematic or regional focus
- Matching scholars with researchers at other universities (funding to support collaborations)
- Orientation sessions for scholars (inbound)
- Develop a QES YouTube channel to share experiences (providing online workshops, research project updates, etc.)

Providing additional financial support for project administration and scholars to support their research:

- Financial support for administration costs including project coordinators, training programs, and translation services
- Funds to support scholars' continued research at LMIC partner organizations and institutions
- Teaching releases and travel funds for PIs
- Teaching releases for LMIC scholars to allow them to accept a QES-AS award
- Contributions to publications costs
- Support for the education part of PHD programs
- Child and elder care expenses for scholars with families and/or care work responsibilities
- Evaluation activities –for long-term follow-ups
- Funding to conduct comparative research in home countries or other communities

Table 5: What do scholars, partner institutions and Canadian universities hope to gain from the QES experience?

Groups highlighted the ways that scholars, Canadian institutions, and project partners benefited from the QES-AS program. Overall, there was consensus that participating in the program provided opportunities for (global) networking, publications, joint research projects, capacity development, and knowledge mobilization activities. More specifically,

Participants shared that scholars felt they additionally benefited from:

- Research skills development
- Exposure to different social, cultural, and community experiences (beyond academia)
- Opportunities for further education/employment
- Gaining a better understanding of how research is done in Canada and new conceptual frameworks
- Building networks through internships
- Leadership skills development
- Partnerships with other scholars to work together and publish
- Knowledge sharing platforms to gain different perspectives, conduct interdisciplinary work, frame problems, etc.
- Learn more about the decolonization process to inform work in their home country
- Mentorship opportunities in writing articles, academic and non-academic skills, new areas of research, etc.
- Access to grants to continue research at home

Canadian universities specifically benefited from:

- Building and strengthening international partnerships/collaborations
- Bringing global cultures to Canadian campuses that may not have been there before
- Fostering awareness, empathy, sensitivity with local scholars and surrounding communities
- Building their international reputation
- The internationalization of their academic programming
- Contributing to more reciprocal South to North learning, research approaches, frameworks (i.e. GHN)

Participants shared how partner institutions (LMIC and research placement partners) have expressed benefits in:

QES-AS Projects Workshop

- Building and strengthening international partnerships/collaborations
- Scholar training and cultural diversity at their institutions
- Stronger and wider dissemination of findings
- Learning from other institutions in the QES network
- The empowerment of local people/institutions
- Building a stronger international reputation
- Building the capacity of current and future professors at their institutions
- Learning more about joint proposal development, planning, collaboration, equal partnerships, etc.
- New solutions, approaches and innovative ways to enhance productivity
- Connections to new knowledge through scholars' increased information access (e.g. articles in English)
- The bridging of gaps between academia and industry
- Increased access to sustainability options after the program ends
- Facilitating research across other LMIC institutions

All groups noted interest in building capacity through access to new or alternative perspectives (whether that be in terms of forms of research, diversity of thought, or the sharing of new knowledge) and in how those intersections could be used to develop their individual or institutional capacities, reputations and access to future resources.

Table 6: Where do institutions want to build capacity?

Canadian universities, LMIC partner institutions/organizations, and the research placement partners have shared in a variety of ways (reports, informal discussions, experience, etc.) some of the key areas they would like to build capacity through the QES program. The workshop participants highlighted the following themes:

Canadian institutions are looking to the QES-AS for capacity building on/through:

- Enhancing the diversity of their institutions' scholars and faculty populations
- Internationalizing their research programs
- Addressing immigration, visa issues
- Increasing work with international institutions (beyond MOUs)
- Establishing shared goals with outside organizations and institutions
- Accessing research potential in new fields (through new populations, networks, topics, etc.) and global, large datasets (such as climate change)
- Incentivizing the retention of good people
- Mentorship programming and support

LMIC partner institutions have communicated that they are interested in capacity building on/through:

- Building doctoral research programs
- The adoption and innovation of new technology
- Economic growth
- Gaining exposure to emerging and alternative research engagements
- Skills development for professors (focused on models such as leadership, practical skills, community engagement skills, and teaching/learning models like the Society for Teaching and Learning in Higher Education)
- Developing future collaborations (research, scholarship, etc.)
- Having access to resources through partnerships
- Supporting the development of emerging scholars from their institutions (using 'training of trainers' models)

Research placement partners have communicated that they are interested in building capacity by gaining:

QES-AS Projects Workshop

- Exposure to different perspectives and conducting research abroad
- Evidenced-based research, evidence-informed policy development
- Access to the 'unknown'
- Access to funding applications
- Sustainable partnerships
- Other skills through knowledge mobilization and genuine engagement (e.g. evaluation skills, staff training)

Across all three institution types, there was an interest in wanting to build capacity in needs assessment and in the identification of through access to research resources and research potential.

Table 7: What are some tangible capacity development goals for the project by 2020?

Given the program will end next year, workshop participants were asked to share tangible goals they felt would be achievable by the end of the QES-AS program. Some of the ideas listed included:

Development of scholars' career by looking at increases in the number of:

- New permanent positions attained (such as tenure) per scholar
- Professional concurrent education programs completed per scholar
- Changes in the number of scholars from underrepresented groups across all researcher groups/levels (e.g. improvements to gender balances)
- The long-term retention of scholars at their home institutions after returning

Leveraged financial resources from outside sources, including:

- Increases in collaborative grant applications
- Higher amount of doctoral resources advanced

Knowledge production and dissemination, looking at increases in the number of:

- Invited talks, events, conference presentations or other forms of participation by researchers
- Papers and publications produced
- Interviews with local/national media
- Policy briefs, grey literature contributions made
- Curricular contributions (bilaterally)
- Journal start ups for QEScholars

Networks, partnerships developed and research domains for projects and scholars, looking at increases in:

- Social media engagement and followers
- The number of meetings and collaborators scholars and institutions have
- The continuity of partnerships beyond QES projects
- Institutional partnerships (e.g. university – university)

Evaluation activities, by looking at the development of:

- Monitoring mechanisms to examine long-term effectiveness and benefits (institutional and personal)
- Connections between work produced and metrics listed
- Longitudinal reports from scholars, institutions and partners
- Stories, testimonials, 'book' cases
- Research capacity (technology/research) of the all institutions (LMIC, research placement, and Canadian institutions)

QES-AS Projects Workshop

Table 8: What role can networking play in the development of research capacity?

Several themes were discussed in how networking, at events like this workshop and conversations with stakeholders, could play a role in developing the research capacity of scholars and partner institutions. These included:

- New opportunities created through connections made during field work, with mentorship relationships, in scholar empowerment programs, and by working with community actors
- Sharing of new perspectives, information, and cultural norms (two-way dialogue) to engage in collaborative problem solving, and to develop creative, innovative ideas for new projects
- Best practices for research collaborations (e.g. research and social skills, identification of research expertise, other knowledge transfer activities)
- Increased knowledge and accessibility to financing options (e.g. leveraging funds for projects and grants), as funding agencies require partnerships
- Improved resources use, including the use of comparative value, methods, theories, issues, etc.

QES-AS research project overview and preliminary results

This presentation focused on sharing some of the preliminary findings from the QES longitudinal study. The study is focused on better understanding the benefits accrued by scholars and participating institutions as a result of the QES-AS funding, as well as understand how to develop international mobility-based scholarship programming is inclusive, equitable and gender-sensitive.

Some notable results from the scholar surveys include:

1. 87% of participants report QES-AS collaboration activities increased the quality of their research outcomes/output.
2. The frequency of researchers' collaborations increased; notably:
 - a. 43% of participants stated they collaborated with researchers from other disciplines/research fields more or much more frequently
 - b. 30% of participants stated they collaborated with researchers/institutions from other LMICs more or much more frequently
3. 80% of participants indicated that mobility was very or extremely important to achieving their next career step
4. 80% of participants felt they developed or strengthened their leadership skills, while 63% felt they developed or strengthened their global competencies

From the institutional surveys, over 60% of the participants additionally reported:

1. Increases in both the quality and amount of research conducted;
2. Engaging in research or project implementation collaborations throughout the first year of the program; and,
3. That they were able to use available resources more efficiently/effectively, enhancing stakeholder satisfaction and providing more timely responses to address stakeholder needs.

Looking forward, the research team will be conducting interviews from January – June 2020 and launching a one-year follow-up survey for scholars to better understand the impacts of the scholarship program. Once the interviews have been conducted and more survey responses have been received, we will conduct an analysis of the disaggregated data to have a more intersectional understanding of the impacts of the program on participating scholars and institutions.

For more information about the study, please contact Cate Lawrence, Research Officer by email QESresearch@univcan.ca or phone +1 613-563-3961 ext. 254.

QES-AS Projects Workshop

Cultivating emerging leaders – skills for a successful career in research

The final session of the day was led by Dalo Njera, Early Career Researcher, Mzuzu University, Malawi (at Carleton University); Deborah Dewey (represented by David Bethune), PI/Professor, at University of Calgary; Kossi Akpaki, Doctoral Researcher, Ministry of Health, Togo (at Université de Moncton); Mary Caesar, Post-doctoral Researcher, University of Cape Town, South Africa (at Wilfrid Laurier University); and, Paul Benalcazar, Doctoral Researcher, ESPOCH, Escuela Superior Politécnica de Chimborazo, Ecuador (at Lakehead University).

The discussions highlighted the many different definitions and leadership styles scholars and project leads use depending on their context. The general definition set by the panel was leadership as the process of influencing others to act towards a common goal. Of the many ideas discussed in the panel presentations, the importance of communication (listening, feedback), mentorship (empowering others to become leaders themselves), and ensuring community actors were core voices heard and represented were all highlighted as being keys to success in both academic and non-academic leadership.

Panellists focused on the differences between non-academic and academic leadership, which was followed by an overview of the challenges and opportunities in the development of leadership skills through the QES-AS program.

Knowledge, skills, attitudes and behaviours associated with non-academic (general) leadership included:

- The ability to motivate others
- The ability to make decisions, while understanding and accepting their positive and negative implications
- Authenticity (“show me how to be a leader by exhibiting those qualities”)
- Taking initiative – the ability to act upon emerging issues or changes efficiently and effectively
- Having a strong sense of accountability
- Awareness and recognition of power imbalances, acting in a way to mitigate this
- The ability to empower and encourage others to become leaders themselves
- Communication skills, with an emphasis on the importance of listening

More specifically, knowledge, skills, attitudes and behaviours that were associated with academic leadership included:

- The ability to provide constructive, timely feedback, especially with key research decisions
- The ability to give scholars more academic agency through giving scholars confidence in their research process, acting as a ‘sounding board’, providing guidance/training when needed (e.g. interview training)
- The ability to work independently, efficiently, and effectively to manage responsibilities optimize personal work and contributions
- Awareness of different leadership styles (such as laissez-faire – authoritarian – democratic styles of leadership) and the ability to apply the accurate style depending on the context and needs of the group/team
- Creativity, actively seeks new perspectives and interconnections that can lead to new ideas and outside your field
- Takes initiatives – is proactive and reliable in terms of personal and group work
- Inclusivity, makes an active effort to develop sustainable connections with collaborators and community members
- Adaptability to changing situations and needs of the research project
- Strong and effective communication skills with other team members, even at a distance
- Determination, passion, and persistence in their research efforts
- Knowledgeable – a strong thought leader in their respective research area, topic, methodology, etc.
- Advocate - and shares information/results from research with the team and outside groups

QES-AS Projects Workshop

Challenges in developing leadership skills through the QES-AS program include:

- Establishing mentorship relationships for scholars that are beneficial for both the mentor and mentee
- Finding the time to establish and ensure an effective mentorship relationship can be difficult with the demands professors have (e.g. long periods of time between feedback sessions) and the scholars' limited time in-country
- Ensuring there is capacity at the scholars' home institution/communities so that scholars are returning to opportunities where they can apply the leadership skills gained from their participation in the QES-AS program

Opportunities for scholars to develop leadership skills through the QES-AS program:

- By working with community members, UN bodies and local NGOs, scholars shared research findings that could influence programs to benefit both local and international communities (e.g. research on iron deficiency), showed thought-leadership, and developed their communication, influence, and motivational skills.
- By being required to conduct a community engagement activity, scholars took initiative, organized an activity, and found ways to mobilize knowledge and connect with others that they did not normally engage with.
- By working with a mentor and collaborative research team, scholars had the chance to learn by watching and working with leaders in their field, while also gaining confidence in their skills and ability to conduct research as a result of the feedback they receive. The importance of having quality time with the mentor was emphasized by multiple scholars and mentorship relationships in general was a key theme of the session.
- By collaborating with other researchers, scholars developed their accountability skills, communication skills, and ability to inspire newer researchers they may be acting as a mentor to.
- By engaging with community members, where scholars may be perceived as having more power, scholars practiced listening skills and actively worked on disempowering themselves, to empower others.
- By conducting seminars, participating in conferences, developing research plans, and preparing papers (while potentially being separated from their regular support networks), scholars developed their sense of autonomy, ability to work independently, their proactiveness, and adaptability skills.

QES-AS Projects Workshop

Day 2 – Thursday, May 23rd, 2019

Workshop for project leads

Defining success for QES-AS projects: High-level overview and insights

This session was led by Erica Di Ruggiero, PI/Professor, University of Toronto; Raphael Idem, PI/Professor; University of Regina; Susan Elliott, PI/Professor, University of Waterloo; and, Victor V. Ramraj, PI/Professor, University of Victoria. The panel mainly focused on the need to use holistic frameworks that develop and adapt the project's definition of success with all partner organizations, throughout the duration of the QES-AS program.

From the session discussion, several challenges were highlighted when looking at ways to define and measure success:

- Project length and measurement: more time is needed, both in the implementation and measurement timeline (e.g. tracking studies) to capture a better understanding of the impact of the program
- Relationships (with partners, scholars): it takes a long time to develop and establish partnership agreements/plans
- Resource-intensive program: project implementation requires extensive human resources (e.g. translation, administrative work), institutional support and, in many cases, external financial resources
- Flexibility and adaptability: because there are so many variables, project goals and partners' needs adapt over time, meaning definitions of success, and ways of measuring it, must be also be flexible
- Gaps in scholars training and individual capacity development needs: scholars need various levels of mentorship and support, which means there is no 'one size fits all' solution when designing the project measurement tools
- Home institution and community reintegration: some institutions do not have the same resources or structures that support scholars' ability to apply the skills learned or scholars are offered other opportunities at different institutions; in other scholarship programs, some scholars do not return to their home institution following the completion of their scholarship

This said, there were multiple ways projects defined success depending on their area of research, their partners' interests, and the modality of their respective projects. Four major themes that emerged from these discussions and examples of how QES-AS projects define success include:

"Building on the capacity that is already there"

- Having culturally safe(r) spaces in classrooms that allow for discussion and understanding of other ways of knowing, which develop reciprocal capacity building and learning opportunities
- Mentorship for young researchers, particularly for researchers from traditionally underrepresented groups
- Identifying partner institutions' needs, then ensuring their scholars receive relevant training during their scholarship
- Ensuring scholars who go to work at partner institutions are able to support the partner institutions' needs

"Knowledge mobilization, knowledge transfers, knowledge translation, knowledge sharing"

- Develop/create knowledge or synthesize fragmented knowledge and then disseminate it to be used by the end users
- Technological components – computational skills/power, laboratory facilities, and equipment
- Access to resources after the completion of the scholarship program
- Cultural context: the ability to define challenges, to adapt and link research to complex national solutions, and to see how the research can provide solutions to policies, action, activities, etc.
- Contributions to institutions, scholars and community knowledge

QES-AS Projects Workshop

“Production is innovation”

- Creating synergies between research areas –
- Subtle orientation changes in how an institution operates or views their work to be more inclusive, productive, effective, etc. (e.g. the consideration of sex and gender in data collection, leadership styles)
- Developing new forms of efficiency and finding new opportunities for cost reductions
- Production of physical products, conference presentations, publications (as authors, co-authors or contributors)
- Technical leadership - based on skills acquired through the program, how scholars apply these skills to tangible outcomes such as clean energy factories, policy recommendations, new forms of law (e.g. property law in Bhutan)
- Scholars feel they have a place to ‘test-drive’ their ideas by negotiating their research project with a dedicated mentor or practice ‘selling an idea’ to someone not associated with the project or program

“Building and strengthening networks – the power of the networks”

- Building connections where scholars/institutions can get traction – connectivity to community challenges
- Developing and strengthening of alumni networks (e.g. have alumni act as mentors to new scholars for ensure support provided is relevant and meaningful to the scholars)
- Enhancing the visibility, reputation, prestige and recognition of the work of the partner institutions (and scholars) within their own country-context and internationally
- Using the project as a lever to enhance networks/partnerships, but also gain access to additional financial resources
- Developing the capacities of scholars who will have a leadership role at their institution in the future
- The creation of new institutions or divisions by alumni scholars (e.g. a new research centre focusing on a key theme)
- Expansion of the QES-AS network through the inclusion of underrepresented groups (e.g. having female QES alumni, who are a part of an organization’s leadership team, encourage other junior women to apply to the program)
- Developing MOUs and adapting existing partnership agreements to reflect the needs of the involved institutions
- Hosting conferences and workshops that expand the QES-AS network and bring other actors into the community to develop and strengthen national and international networks for the scholars and participating project partners
- Creation of mentorship, workshops sessions and informal connections/supports that act as platforms to network with other scholars and field leaders

World Café - Knowledge transfer: strategies to achieve & measure success

Project leads discussed key administrative and planning challenges that projects have highlighted in their knowledge mobilization strategies throughout the implementation of the QES-AS project.

Table 1: Jointly developing a research plan – timeline and other considerations

Some aspects project leads found were useful in developing a research plan include:

- Starting early conversations on the interests of the scholars and LMIC and research placement partners, as discussions can sometimes take years (e.g. Skype conversations to set research plan, to conduct interviews; In-person partners visits to develop plans when communication or language may prevent planning from a distance)
- Establishing possible mentorship relationships that supports both the scholars’ work in LMICs and Canada
- Ensuring the project has a strong alignment with objectives of the QES program, partner institutions’ goals, scholars’ research interests, and the mentors involved (and that the mentor is involved with the research plan)
- Respecting operational differences between institutions in the design of the project mobility scheme and communications between partners (e.g. hierarchy, timeline considerations, teaching responsibilities, etc.)

QES-AS Projects Workshop

- Ensuring the impacts of differences between Canada and LMIC partner institutions with respect to timeline, research priorities, and expected outcomes are considered before the project is launched
- Managing and developing realistic expectations, for scholars and project partners, is important in terms of plan development, communications, research capacity improvements (prior to and during placements), language capabilities, the availability of other complementary grants to support research, etc.
- Having scholars come to Canada during the Canadian summer, as the timing was better for scholars and professors
- Use a 'bite-sized chunks' approach to knowledge transfer, ethics approval processes, and pre-training (if possible)
- Providing a 'menu-based' approach to training opportunities for scholars and partner institutions based on the length of placement and the scholars' research level (PhD, PD, ECR) and training needs
- Encouraging scholars to invest in publications (vs. conferences) and providing lower fee options for LMIC scholars
- Ensuring research partnerships are not too linked to specific individuals – need to deepen partnerships within and across faculties, researchers, and other networks

Table 2: Identifying research placements, cultivating relationships, navigating bureaucracy, challenges, etc.

Overall the project leads felt that even with the diversity of project structures represented, projects generally took a relationship approach that was either partner or scholar-driven to cultivate a new partner or research placement.

Looking at the project life cycle, project leads identified some of the challenges they experienced in identifying research placements, cultivating relationships, and navigating bureaucracy:

- Immigration processes (e.g. securing the right visa)
- Communication with partners including time differences, language barriers, etc.
- The time needed to develop and sign MOUs, confidentiality agreements between institutions
- Finding affordable accommodation for scholars (both in Canada and abroad) while working with a research partner
- Finding the right match for research/institutional placements
- Delays in setting up payments (such as setting up a bank account)
- Challenges related to cultural and linguistic differences
- Some scholars research experience meant they were unable to work independently
- Reporting - frequency does not match reality of recruitment, complexity of financial reporting is time consuming
- Access to resources, including software access, human resources, and local staffing

Solutions projects found to deal with these challenges include:

- Possibly including a virtual placement option for scholars who do not have the right work in the country of the research placement partner (i.e. conducting virtual research for the partner in the LMIC in Canada or vice versa)
- Establishing linkages in developing off-site research interests in partnered countries
- Identifying research placements and other support networks at the start of recruitment, through pre-departure connections, with the support of local community partners e.g. Ghanaian Friendship Society
- Matching and envisioning LMIC and local partners
- Working on research readiness – ensuring scholars and partners have realistic expectations
- Requesting a designated human resources support person
- Providing a structured orientation on pre-departure and arrival arrangements
- Widening the breadth of institutional relationships (tapping into networks of faculty/researchers with links in LMICs)

QES-AS Projects Workshop

Table 3: Measuring success from a distance – LMIC-LMIC mobility

One issue raised was that the projects measure standard metrics (publications, presentations, personal highlights, etc.), but there is more interest in the longer-term impacts and ripple effects of the program, and how it contributes to knowledge mobilization and capacity building. Given the number of parties collecting information, more clarity on what should be collected and by whom was requested to help projects better understand the QES-AS theory of change.

Some of the ways projects would like to (and are) measuring success of their projects include:

- Tracking the career paths, roles/leadership changes of scholars after the program (long term objective)
- Determining ways to measure policy influence/uptake (what's reasonable to expect, given the project time period)
- Conducting a social media impact analysis – awareness of the projects, scholars and program in general
- Accounting for peer-reviewed publications and co-authorship (who is around the table during these conversations)
- Looking at the co-creation of grants
- Completing reporting processes in-person, particularly when there are language barriers
- Building knowledge mobilization activities into outcomes (e.g. in government dialogues for a local issue)
- Measuring the amount and type of collaborations between scholars at different institutions
- Accounting for changes in the recognition and representation of LMIC partners in their national context (being recognised as leaders in their domain, narratives about these qualitative results, etc.) and internationally
- Understanding how the program adds depth to existing research lines and elevates the level of research conducted
- Tracking engagement of QES alumni with current scholars
- Connecting with LMIC-LMIC partners through events such as conferences, having research placements in LMICs, hosting scholars at institutions to network, etc.
- Determining the likelihood of the persistence of relationships (e.g. scholar - scholar)

Table 4: Challenges and strategies used to address Canadian institutional barriers

Finally, there are several challenges projects face at their respective institutions. Project leads were asked to list some of the main challenges they face and discuss possible strategies that could be employed to address them:

Challenges	Potential strategies
<p>Administrative work can be overwhelming:</p> <ol style="list-style-type: none"> 1. Faculty cannot also do administrative work; 2. Sometimes administrative work is assigned to a non-administrative person (e.g. a grad student), which can be overwhelming for them 3. More challenging to get support at a larger institution 	<ol style="list-style-type: none"> 1. Centralize administration to an international office or have a designated administrative person 2. Have QES team connect with institution leadership 3. Would have been useful to connect programs at beginning to learn from and sort out processes
<p>For Financial challenges:</p> <ol style="list-style-type: none"> 1. In issuing the first payment to scholars, some project leads are using personal funds for start up (which the scholar then pays back) 2. Some university financial/administration processes take about 6-8 weeks to get payments 3. Scholars' payments include tax-deduction on stipend, which scholars then must get reimbursed from CRA later 4. Sharing funding (and credit) when a project is an interdisciplinary collaboration between two faculties (e.g. nursing and nutrition) can be challenging 	<ol style="list-style-type: none"> 1. Budget with risk tolerance (prioritize necessary expenditures and things to cut if needed) 2. Look for alternative payment models 3. Provide financial literacy training for scholars so they can better navigate financial processes (i.e. banking, university pay, CRA claims, etc.) independently

QES-AS Projects Workshop

Challenges	Potential strategies
<p>Different capacities and scholars' responsibilities at their home institutions:</p> <ol style="list-style-type: none"> Scholars' ability to leave country to fulfill the minimum 3-month requirement (especially for ECR professionals, who may not be able to go for 3 months) is often limited by family and teaching obligations Some outbound scholars' language capacity for their placement country limits their ability to participate in the work of the LMIC institution fully Matching funding and project cycle with scholars' PhD completion timeline is challenging 	<ol style="list-style-type: none"> Support before, during, and after the scholarship period: Well-planned predeparture and orientations (e.g. library, laboratories, campus tours, IT support) Connect scholars with local students and QES alumni from their countries Provide weekly check-in session with project PI(s) Provide other forms of support based on the needs of the scholars e.g. weekly seminars, public speaking opportunities Break-up time scholars are away (e.g. 1 month x 3) Provide scholars access to campus resources (e.g. technology, library, writing workshops, etc.)
<p>Administrative challenges:</p> <ol style="list-style-type: none"> Local ethics approval process can be lengthy Technical glitches with the online portal Many visa issues - especially for research placements Scholars need a work permit to come in, and so they have to be on the payroll 	<ol style="list-style-type: none"> Contact the QES team – they can help with technical issues and potentially connect projects to others who have found solutions (e.g. visas, administrative reporting, etc.)

Overall key take-aways and feedback from the workshop

Over the course of the two-day workshop, the following key messages were noted in multiple sessions:

- QES-AS projects really benefit from integrated institutional support (from various faculties, administrative bodies, etc.) at the Canadian universities to ensure scholars have the best experience possible.
- Due to the time required to build relationships, institutions that used the QES-AS funding to expand an existing project or used the funding to grow their project into something larger, have found the project more sustainable.
- Having a cohort of scholars, that arrive and work together despite maybe being from different disciplines or (home) communities, can provide additional opportunities for scholar networking, collaborations and support.
- Formalizing mentorship and alumni networking relationships within the QES-AS program (through QES Connect or other platforms) would be appreciated by scholars and project leads alike.
- There is strong interest in more networking events between projects – for both scholars and PIs. Suggestions included workshops, conferences, and virtual platforms to share research interests and identify possible projects/researchers working in similar areas, focusing on similar thematic areas or regions.
- Institutions and scholars alike highlighted that the quality of research they were conducting was enhanced by QES-AS funded collaborations and that they have benefitted from being in the program.