

# CHARTING THE COURSE: STRATEGIC PLANNING FOR KNOWLEDGE MOBILIZATION IN RESEARCH-INTENSIVE UNIVERSITIES

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## Abstract

This study examines the strategic knowledge mobilization (Kmb) planning resources employed by research-intensive universities. Focusing on four universities that participate in a professional network dedicated to Kmb, the analysis identifies distinctive approaches to Kmb, highlighting key features such as impact assessment, global challenge alignment, knowledge exchange, and needs-based infrastructure development. Key differences across the institutions include the specificity of implementation plans, the degree of stakeholder engagement, and the strategic use of resources. Drawing on resource-based view, institutional theory, and social learning theory, this study underscores the importance of tailoring Kmb strategies to local contexts while leveraging broader institutional goals and theoretical perspectives. These findings offer valuable insights for university administrators and emphasize the need for further research to build an evidence base for Kmb and to strategically integrate it into core institutional functions for addressing complex societal challenges.

**Keywords:** knowledge mobilization, strategic planning, research impact, higher education, stakeholder engagement

## Résumé

Cette étude examine les ressources de planification stratégique de la mobilisation des connaissances (MdC) utilisées par les universités à forte intensité de recherche. En se concentrant sur quatre universités participant à un réseau professionnel dédié à la MdC, l'analyse identifie des approches distinctes, mettant en lumière des caractéristiques clés telles que l'évaluation de l'impact, l'alignement sur les

défis mondiaux, l'échange de connaissances et le développement d'infrastructures fondées sur les besoins. Les principales différences entre les établissements incluent la spécificité des plans de mise en œuvre, le degré d'engagement des parties prenantes et l'utilisation stratégique des ressources. S'appuyant sur la théorie des ressources, la théorie institutionnelle et la théorie de l'apprentissage social, cette étude souligne l'importance d'adapter les stratégies de MdC aux contextes locaux tout en tirant parti des objectifs institutionnels plus larges et des perspectives théoriques. Ces résultats apportent de précieuses informations aux administrateurs universitaires et soulignent la nécessité de mener des recherches supplémentaires pour constituer une base de données probantes pour la MdC et pour l'intégrer stratégiquement aux fonctions institutionnelles fondamentales afin de relever des défis sociétaux complexes.

**Mots-clés** : mobilisation des connaissances, planification stratégique, impact de la recherche, enseignement supérieur, engagement des parties prenantes

## INTRODUCTION

Universities are critical in equipping societies to address local and global challenges (Hall & Tandon, 2021). The traditional role of universities as societal institutions dates to the earliest forms of higher education (Benneworth et al., 2018), and recent years have seen a convergence of social forces generate new expectations for how universities serve the public good (Calhoun, 2006; Kokshagina et al., 2021). Higher education policy environments increasingly pressure universities and researchers to demonstrate how public research investments yield impacts beyond academia (Pedersen et al., 2020; Smit & Hessels, 2021). The concomitant efforts they engage in are called knowledge mobilization (KMb).

KMb refers to an intentional, active process by which knowledge is shared among research production, mediation, and use contexts (Levin, 2013). Sometimes referred to as knowledge exchange, knowledge translation, or knowledge transfer, the fundamental tenet of KMb and its related terms is to get research into the hands of people who could benefit from it (Powell et al., 2017; Ward, 2017). For universities, KMb can enable multidirectional connections between researchers and decision makers that can facilitate relevant and impactful applications of research in real-world contexts (Phipps et al., 2016; Smit & Hessels, 2021). However, achiev-

ing these connections and ensuring the effective use of research in decision-making processes requires institutional strategic planning. The importance of this strategic planning for KMb is an emerging area of inquiry, as universities face challenges in developing and implementing effective strategies for KMb (Farley-Ripple et al., 2022, 2023).

This article examines the KMb strategic planning resources employed by Research Impact Canada (RIC) member universities. Founded in 2006 through a SSHRC/CIHR Intellectual Property Mobilization grant, RIC has grown from a two-university collaboration into a network of over 30 universities and research organizations whose KMb efforts rank among the most impressive in Canada (Cooper, 2014). While KMb has been most strongly emphasized within SSHRC and CIHR funding contexts, it is similarly relevant to other research areas, such as those supported by NSERC, where mobilization and knowledge translation practices are also encouraged to enhance the societal impacts of research. The RIC network's activities have been likened to "a community of practice for research mobilization and includes knowledge brokers, researchers, and other practitioners looking to exchange information on best practices, past successes, and future directions" (McKean & Robbins, 2016, p. 6).

Through this research, we contribute to the evidence base for how universities conceptualize, implement, and evaluate KMb. The questions guiding our inquiry were as follows:

1. What are the general features of the strategic planning resources used by universities for KMb (e.g., key concepts, activities, focal areas, and target audiences)?
2. How do universities align their KMb planning resources with institutional contexts and goals, and what frameworks support this alignment?

In the following sections, we provide a review of recent literature, including the building of KMb capacity in universities and strategic planning for KMb as well as the theoretical perspectives that informed our analysis. We then present our findings aligned with the research questions and discuss the implications for various audiences, including researchers, practitioners, and policy makers.

## LITERATURE REVIEW

### Building Capacity for KMb in Universities

Building capacity for KMb in universities has received significant attention in recent years, driven in large part by governments and research funders declaring a gap between publicly funded research and its potential societal impacts (Golhasany & Harvey, 2023; Pedersen et al., 2020). However, the now-expansive literature on KMb and its related concepts belies the challenges researchers and universities face in understanding and engaging in effective patterns of practice (e.g., Cain et al., 2018; Cooper et al., 2018; Zuiker et al., 2019). Benneworth et al. (2018) highlighted two primary issues:

1. Like concepts such as community engagement, KMb is conceptually vague, and it is embedded to varying extents across universities' teaching, research, and "third mission" activities.
2. Universities, as primary knowledge producers, are "extremely complex organisations...[with] major inter-institutional differences based on their missions,

study programmes, size and external environment...[as well as] high intra-institutional diversity due to being composed of different disciplinary communities with different norms and values" (pp. 137–138).

As a result of these issues, building capacity in KMb has been largely an independent and ambiguous exercise for universities (Bayley & Phipps, 2019a; Powell et al., 2017), with limited research to inform the design or operationalization of KMb-aligned structures and functions (Davies et al., 2015; Ward, 2017). In the face of increasing pressure to demonstrate societal impacts, the situation resembles what Watermeyer (2016) described as a "blind panic" as universities struggle to reconcile their role(s) in the political, cultural, social and self-evidently knowledge economies, vacillating between detached and critical scrutineers or commentators and integrated accomplices of government, industry and business" (p. 201). Simply put, limited empirical evidence exists about how universities can do KMb well.

The need for more capacity building in KMb is further illustrated by studies that show it remains a peripheral concern for many researchers (e.g., Cooper et al., 2018; Fischman et al., 2018). An issue felt by researchers and institutional staff alike is that efforts under the banner of KMb do not neatly group into one aspect of academic work (i.e., service, teaching, or research). Moreover, there is often little time for more collaborative types of KMb, a lack of institutional resources, unrealistic expectations and work overload, short-term contracts for impact-related staff, and limited professional support and development (e.g., Lightowler & Knight, 2013; Nyström et al., 2018; van der Graaf et al., 2019; Wye et al., 2020).

### Institutional Logics and Ethical Considerations

In Canada and abroad, the modern university is both "the primary place of learning and scholarship [as well as] a service-provider competing within a complex commercial and knowledge landscape" (Williams & Grant, 2018, p. 93). Uni-

versities are increasingly expected to demonstrate societal impact through strategic planning documents, requiring adaptation to new KMb demands (Fischman et al., 2018). While frameworks have emerged to guide these efforts, detailed accounts of implementation remain limited (MacKillop et al., 2020).

Bayley and Phipps (2019a, 2019b, 2019c) define five domains of institutional impact health (i.e., commitment, clarity, connectivity, competencies, and co-production), which together shape an institution's ability to support impact. Their work finds that institutional capacity and individual capacity are interdependent; as they note when speaking to the limitations of individuals developing their competencies to achieve impact, any benefits "will be capped or even nullified if the institution remains unchanged" (Bayley & Phipps, 2019b, p. 5). Further insights into impact strategy come from Reed et al. (2022), who distinguish between enabling and achieving impact strategies. Enabling impact strategies are top-down and incentive-driven, focusing on building impact capacity and culture through partnerships and engagement, supported by dedicated impact teams and academic roles. Achieving impact strategies are bottom-up and co-productive, targeting specific beneficiaries with structured implementation plans and boundary organizations to co-produce research and impact, relying less on extrinsic incentives (Reed & Fazey, 2021; Reed et al., 2022). Ferré et al. (2025) provide empirical evidence that these strategic logics can coexist in a single organization, noting that while some research institutions adopt systematic and mandatory procedures for embedding impact (e.g., structured assessment cycles, required reporting), others rely on voluntary engagement and reflexive learning.

The literature also points to persistent tensions and barriers to institutionalizing impact and KMb. Newman (2024) documents striking misalignments within Australian universities, where senior leaders disagreed fundamentally about the definition of impact and the appropriate incentive structures, while most academic staff reported that impact work remained undervalued and unrewarded. This finding echoes

earlier critiques that top-down policy mandates can outpace the development of clear operational supports, leaving researchers to navigate contradictory expectations (Chubb & Watermeyer, 2017; Watermeyer, 2016).

Ethical considerations have also become more prominent in recent scholarship. Jensen et al. (2025) caution that an unexamined assumption of positive impact can obscure harm and exacerbate power imbalances with communities. They propose an ethics of care approach, anchored in principles such as proportionality, co-production, and long-term relational accountability. Their integrated framework offers specific guidance on risk mitigation, equity, and the design of impact activities that respect community priorities. Reed and Fazey (2021) similarly emphasize that effective impact cultures must align institutional purpose with researcher motivations, noting that narrowly instrumental strategies can undermine trust and creativity. Ferré et al. (2025) further observe that building a culture of impact entails operational supports alongside cognitive and practical changes among staff. Their cross-case analysis of three research organizations found that as researchers engage more deeply with impact practices, they may reframe their understanding of stakeholders, moving from seeing them as passive beneficiaries to active co-creators of knowledge and societal value. In parallel, Hurth and Stewart (2022) argue that purpose-driven universities—those that "use wide stakeholder engagement to thoroughly understand 'longterm wellbeing for all' as the resonant context, appreciate how it is threatened, and decide what their university is best placed to focus its contribution on, given its attributes and particular context" (p. 13)—may be better positioned to integrate impact into strategic planning. They contend that treating impact as a peripheral or compliance-oriented function risks reinforcing the very business-as-usual logics that strategic planning is meant to challenge.

## Theoretical Perspectives and Analytic Framework

Our examination of KMb strategic planning resources was informed by three theoretical perspectives, predicated on the view that KMb is an active process of transforming and communicating research knowledge to inform societal change (Farley-Ripple et al., 2023). Specifically, we drew on the resource-based view (RBV), institutional theory, and social learning theory to frame our analysis.

Resource-based view provided a lens to understand the strategic use of KMb planning resources within universities. Building on Barney's (1991, 2001) seminal work, RBV posits that organizational success stems from the strategic management of valuable, rare, inimitable, and non-substitutable resources (Barney, 2014). In the context of KMb planning, institutions may leverage these resources (e.g., guidelines, templates, frameworks, and case studies) to develop and implement effective KMb strategies. Recent research further emphasizes that intangible assets, such as institutional expertise and networks, play a role in sustaining competitive advantage in knowledge-driven environments (e.g., Wenzel et al., 2021).

The alignment of KMb planning resources with institutional context and goals can be examined through the lens of institutional theory. Institutional theory suggests that organizations conform to prevailing norms, values, and practices within their environment to gain legitimacy (Scott, 2014). Research highlights that institutions adapt to these external pressures as well as shape their environment through strategic actions (e.g., Greenwood et al., 2014). In this regard, institutions may tailor their KMb planning resources to align with their specific goals, priorities, and stakeholders, ensuring that their KMb efforts are contextually relevant and resonate with broader societal and policy demands.

Furthermore, social learning theory sheds light on knowledge exchange and collaboration. Drawing on Bandura's (1977) foundational work, social learning theory emphasizes that individuals and organizations learn through observation, imitation, and interaction. Through

sharing successful and unsuccessful KMb planning strategies and facilitating the sharing of resources and expertise, member institutions engage in collective learning and mutual improvement (MacGregor, 2024). Such collaboration may foster a community of practice where knowledge about KMb planning is actively shared and refined.

Collectively, these perspectives informed the study's analytic framework (Appendix A), which guided the coding, interpretation, and synthesis of collected data. This integrative approach enabled us to examine the strategic attributes of planning resources (as emphasized by RBV) as well as their alignment with institutional norms and priorities (as highlighted by institutional theory) and the collaborative mechanisms through which planning knowledge is exchanged and adapted (as articulated by social learning theory). The combination of these lenses thus captured the interplay between internal assets, external expectations, and social learning processes that shape KMb planning in research-intensive universities.

## METHODS

### Research Design

This article is based on an environmental scan, which is a systematic approach to collecting and analyzing grey literature and other sources "to learn about events and trends in external environments; establish relationships between them; make sense of the data; [and] extract the main implication[s] for decision-making and strategy development" (Costa, 1995, p. 5). For this project, an environmental scan was well-suited to understanding the nature and pace of change surrounding institutional KMb planning as well as "opportunities, challenges, and likely future developments" (Conway, 2009, p. 2). We followed the approach of conditioned viewing (Choo, 2001), involving the examination of relevant publicly available resources of RIC's member universities (see Graham et al., 2008).

## Data Collection

Data collection involved a two-stream search and review strategy. In the first stream, keyword search strings and limiters were applied to the Google search engine. Each search string included the name of an RIC member university and a KMb term (e.g., KMb, knowledge translation, knowledge exchange, knowledge broker, research impact). Search limits required that identified resources were published in English and currently in use (i.e., actively guiding strategic decision making up to when the searches were conducted in November 2022). The website of each search result was investigated in depth for any content relevant to the institutional KMb planning. However, given the increasing likelihood of off-target content in later pages of each Google search, only the first five pages of search results were examined. In the second stream, RIC representatives from each member university were contacted and requested to share any resources missed in the initial searches. Ultimately, the two searches led to the inclusion of four resources: University of Alberta (2020), University of Brighton (2022), University of British Columbia (2019), and University of Ottawa (2020).

## Data Analysis

To analyze the four strategic planning resources, we applied a charting template informed by our two research questions. The template included categories designed to capture contextual information such as the publication date, document type, and key KMb concepts. We also examined focal areas, theoretical frameworks, and practical considerations related to the implementation of KMb strategies. Specifically, the charting process allowed us to analyze how each resource leveraged institutional capacities, engaged with theoretical perspectives, and addressed the needs of target audiences (e.g., faculty, students, external stakeholders). This approach provided a structured way to compare and contrast the resources across the four universities, helping us identify both commonalities and differences in KMb strategic planning.

## FINDINGS

We organize this article into two sections. The first discusses a number of insights resolved from our analysis of the individual KMb planning resources. From there, we outline the common themes across RIC member universities.

### RQ1: General Features of the Strategic Planning Resources

While many RIC member universities have produced resources that discuss KMb and research impact—for example, in sections of broader strategic planning documents—only four have created dedicated, publicly available plans: the University of Alberta (UAlberta), the University of Brighton (UBrighton), the University of British Columbia (UBC), and the University of Ottawa (UOttawa). As shown in Table 1, UAlberta's document provides a statement on research impact, whereas the other three universities' documents outline their institutional KMb strategies. Inspection of the stated aims and motivations underlying each document revealed several commonalities: (1) a focus on improving institutional understandings and engagement with KMb or research impact, (2) an awareness that the societal impacts of research emerge in diverse forms and that not all research generates immediate or obvious impacts, (3) the perspective that communities beyond institutional boundaries occupy a crucial role in pathways to impact, and (4) various institutional capacities are needed to advance KMb and research impact efforts.

When it came to the key concepts employed in the documents (Table 2), UAlberta was the only university to concentrate specifically on research impact—that is, what results from research and KMb efforts. To its definition of impact, the concept of “excellence in research impact” was added, which signified the position that an institutional understanding of impact must remain open to diverse forms and interpretations of impact. UBrighton and UBC both designed their institutional plans around the concept of knowledge exchange, though only the latter provided a concrete definition. University of British Columbia's strategy also pro-

vided a detailed explanation of why knowledge exchange (Kx in their phrasing) was an appropriate concept for its institutional contexts and how it was understood beyond merely the definition (e.g., in different stages of the research process). UOttawa’s plan was organized using the concept of KMb and gives specific attention to the core role of knowledge users and the individuals included in this descriptive grouping.

Shifting to the activities and focus areas described in these documents, each university displayed a distinctive approach to advancing thinking and practice related to KMb and research impact (Table 3). In relation to Bayley and Phipps’s (2019c) institutional impact health framework, all institutions displayed a moder-

ate to strong clarity about what KMb or research impact entailed. Similarly, as evidenced by the existence of these institutional planning documents, all four universities displayed a commitment to embedding these concepts in institutional systems and structures. The other three elements—connectivity, co-production, and competencies—were more varied across the universities. UAlberta, likely owing to the nature of its document (a statement, not a strategy), indicated an awareness that alignment and cohesion among organizational units is needed to shift policy and practice related to research impact. Its statement was less clear, however, on how impact-related competencies could be developed within the university, or the extent and

**Table 1**  
*Aims of the Institutional KMb Planning Documents*

	<b>Document Type</b>	<b>Aim(s)</b>
UAlberta (2020)	Statement	“consider and, when justified, to improve our approaches to evaluating and incentivizing research impacts” (p. 1)
UBrighton (2022)	Strategy	<ol style="list-style-type: none"> <li>1. promote research and knowledge exchange <b>excellence</b>...</li> <li>2. recognize, reward and <b>nurture talent</b>...</li> <li>3. invest in <b>sustained impact</b> that delivers a positive change to society and local communities</li> <li>4. grow our <b>international</b> collaborations and links and make a demonstrable difference to the global challenges facing society. (quoted list from p. 1)</li> </ol>
UBC (2019)	Strategy	<p>The document outlines three core areas that are considered both part of the institutional knowledge exchange strategy as well as focal points for the Kx Unit.</p> <ol style="list-style-type: none"> <li>1. Build capacity among individuals and across the institution to succeed in and advance knowledge exchange practices.</li> <li>2. Connect people within and beyond UBC.</li> <li>3. Clarify the frameworks, methods, and tools to measure research impact and create opportunities for celebrating UBC research that has effected positive change. (summarized from pp. 5–6)</li> </ol>
UOttawa (2020)	Strategy	The strategy “builds on our collective rich base of expertise and provides the support our entire research community needs to mobilize and increase the impact of their research.” (p. 2)

**Table 2**  
*Key Concepts and Definitions*

<b>Key Concepts</b>	
UAlberta	<p><b>Research impact:</b> The demonstrable contribution of research processes and outputs to scholarship and society.</p> <p>Excellence in research impact: “We define excellence in research impact broadly and inclusively to recognize the validity of different dimensions and interpretations of impact across disciplines, research programs, and all related scholarly activities” (p. 2)</p>
UBrighton	<p><b>Knowledge exchange:</b> No definition provided.</p> <p>Global challenges: Well-being, equality and inclusivity, climate change, creative, sustainable economies</p>
UBC	<p><b>Kx [knowledge exchange]:</b> Drawing on the University of Edinburgh definition, Kx is “a process which brings together academic staff, users of research and wider groups and communities to exchange ideas, evidence and expertise.”</p>
UOttawa	<p><b>Knowledge mobilization:</b> Working with knowledge users to help them use research to make decisions on policies, programs, practices and behaviours. Includes activities that focus on producing and using research, such as dissemination, knowledge synthesis and co-creation by researchers and knowledge users (known as integrated KMb). Activities vary according to the targeted public or knowledge users’ needs.</p> <p><b>Knowledge users:</b> Stakeholders, decision makers, policy makers, practitioners, community members, patients, and many others.</p>

quality of engagement with non-academics in generating impact. UBrighton’s strategy did begin to address these elements, yet institutional efforts were more implied than directly stated (e.g., how KMb- and impact-related competencies would be developed). Both UBC and UOttawa outlined detailed plans for their KMb and impact activities, with content relevant to each element of institutional impact health. Moreover, both described their strategies as “living documents” to underscore that their efforts would evolve with the changing needs of internal and external communities.

The target audiences and implementation considerations across the four universities were

less varied than other details about these institutional plans (Table 4). All plans focused primarily on building internal KMb and impact capacity with faculty members, students, and staff. Proposed evaluation mechanisms for the planning documents (i.e., whether the proposed activities and focus areas led to demonstrable institutional change) largely relied on quantitative indicators. Both UBC and UOttawa also incorporated some qualitative methods of evaluating strategy implementation, such as observing changes in discussions about the value of KMb in the promotion and tenure evaluation process and interviewing relevant stakeholders.

**Table 3**  
*Activities/Focal Areas and Theoretical Connections*

	<b>Activities/Focal Areas</b>	<b>Bayley &amp; Phipps's (2019c) Institutional Impact Health</b>	<b>Reed et al.'s (2022) Impact Strategy Type</b>
UAlberta	Presents three overarching principles of the statement: <ul style="list-style-type: none"> <li>• How research impact is defined</li> <li>• The importance of valuing a diversity of research impacts</li> <li>• Research impact assessments should include both quantitative and qualitative methods</li> </ul>	Commitment ✓ Connectivity ✓ Co-Production – Competencies – Clarity ✓	Enabling
UBrighton	The strategy describes six “enablers”: <ul style="list-style-type: none"> <li>• Optimize and reinforce relationships</li> <li>• Invest in technology and capital</li> <li>• Dedicate quality-related funding for emerging research areas</li> <li>• Enhance professional support as well as volume and support of the post-graduate cohort</li> <li>• Provide integrated data management systems for real-time metrics on research and knowledge exchange governance and performance</li> <li>• Create a marketing/communications strategy with a resource plan and metrics to support the plan (summarized from p. 12)</li> </ul>	Commitment ✓ Connectivity ✓ Co-Production ✓ Competencies ✓ Clarity ✓	Enabling
UBC	The strategy outlines four activity domains (which they also call objectives), each comprising multiple specific activities the Kx Unit will provide leadership in: <ul style="list-style-type: none"> <li>• “Increase researchers’ awareness and competency in Kx principles and practices</li> <li>• Facilitate access to Kx support through the coordination of Kx-related services at UBC</li> <li>• Strengthen meaningful engagement with external partners</li> <li>• Increase awareness of the societal impact of UBC’s research.” (pp. 8–12)</li> </ul>	Commitment ✓ Connectivity ✓ Co-Production ✓ Competencies ✓ Clarity ✓	Achieving

Activities/Focal Areas	Bayley & Phipps's (2019c) <i>Institutional Impact Health</i>	Reed et al.'s (2022) <i>Impact Strategy Type</i>
<p>UOttawa</p> <p>The strategy outlines four goals, each comprising multiple specific activities:</p> <ul style="list-style-type: none"> <li>• “Provide knowledge mobilization tools, resources, and training which address barriers and develop priority competencies</li> <li>• Provide institutional resources, financial support, and recognition for knowledge mobilization efforts of researchers, research associates, and students</li> <li>• Promote partnership between knowledge users and the uOttawa research community so that we do research with those who use it</li> <li>• Develop an evaluation plan and impact assessment framework to assess the effectiveness of the KMb plan and the impact of UOttawa research.” (summarized from pp. 4–6)</li> </ul>	<p>Commitment ✓</p> <p>Connectivity ✓</p> <p>Co-Production ✓</p> <p>Competencies ✓</p> <p>Clarity ✓</p>	<p>Enabling/ Achieving</p>

*Note. Green checkmarks indicate when a document features content clearly indicative of the respective element of Bayley & Phipps's (2019c) “5 C's” of impact-healthy institutions. Orange checkmarks indicate more implicit indications of the respective elements. Red minus signs indicate neither an explicit nor an implicit indication of the respective elements.*

**Table 4**  
*Target Audience(s) and Implementation Considerations*

	<b>Target Audience(s)</b>	<b>Implementation</b>
UAlberta	Faculty, students, institutional administration, post-docs	<p><b>Key Internal Groups:</b></p> <ul style="list-style-type: none"> <li>• Research Impact Group</li> <li>• University Research Policy Committee</li> </ul>
UBrighton	Non-specific	<p><b>Key Internal Groups:</b></p> <ul style="list-style-type: none"> <li>• University Centres of Research and Knowledge Exchange Excellence</li> <li>• Research and Knowledge Exchange Groups (REGs)</li> </ul> <p><b>Related Initiatives:</b></p> <ul style="list-style-type: none"> <li>• Vice-Chancellor’s Research and Knowledge Exchange Leaders Programme</li> <li>• Research and Knowledge Exchange Internships Programme</li> <li>• Doctoral Training Partnerships</li> </ul> <p><b>Evaluation:</b> The strategy outlines performance indicators that capture internal evidence of progress toward the four aims: excellence, nurturing talent, sustained impact, international</p>
UBC	Faculty, students, research support staff	<p><b>Key Internal Groups:</b></p> <ul style="list-style-type: none"> <li>• Knowledge Exchange (Kx) Unit</li> <li>• Knowledge Exchange Advisory Committee</li> </ul> <p><b>Evaluation:</b></p> <ul style="list-style-type: none"> <li>• “Success Statement” for each activity category</li> </ul> <p>By 2022, Kx Unit planned to verify whether the researchers using their services have developed their capability (knowledge and skills), motivation (maintained or adopted positive attitudes, intentions, and aspirations toward Kx), and opportunity (access to and benefit from appropriate support and incentives to change their practices)—in other words, the COM-B model of change. Planned methods of data collection included surveys and key stakeholder interviews.</p>

	<b>Target Audience(s)</b>	<b>Implementation</b>
UOttawa	Faculty, students, research associates, post-docs, research administration and communication staff, knowledge users, RIC, other KMb organizations	<p><b>Key Internal Groups:</b></p> <ul style="list-style-type: none"> <li>• Research Management Services, Office of the Vice-President, Research</li> <li>• Advisory Committee (not yet established) to advise on implementation and evaluation</li> <li>• Knowledge Mobilization Advisor</li> </ul> <p><b>Evaluation:</b> Various performance indicators are included across the four main goals, relying primarily on quantitative indicators (e.g., number of training opportunities, number of knowledge user interactions).</p>

Table 5 displays unique features of institutional planning documents from UAlberta, UBrighton, UBC, and UOttawa, showcasing their distinct approaches to research strategies and impact assessments. UAlberta differentiates between academic and social/economic impacts, emphasizing the centrality of impact assessment in institutional functions and providing specific calls to action. UBrighton focuses

on Research and Knowledge Exchange groups tied to global challenges, and details stakeholder involvement led by the pro-vice-chancellor. University of British Columbia’s strategy is linked to its Kx Unit, highlighting its vision, mission, and role as one of four innovation pathways. UOttawa includes a vision for KMb, summarizes a needs assessment survey, and outlines a logic model and KMb hub, with a phased

**Table 5**  
*Features Unique to Each Institutional Planning Document*

UAlberta	<ul style="list-style-type: none"> <li>• Differentiates between (a) academic impacts and (b) social and economic impacts.</li> <li>• Notes that impact assessment should remain central to institutional functions “including hiring, merit, promotion, research awards adjudication, and internal rewards.”</li> <li>• Bullet point calls to action for (a) researchers, (b) those who assess, support, and fund research, and (c) central administration and academic units.</li> </ul>
UBrighton	<ul style="list-style-type: none"> <li>• Notes specific Research and Knowledge Exchange groups associated with each of the four global challenges (i.e., aims of the strategy).</li> <li>• Opens with a mission statement for the strategy and closes with a vision statement.</li> <li>• Notes various stakeholders the Pro-Vice-Chancellor (Research and Knowledge Exchange), who is responsible for the strategy, will work with on implementation.</li> <li>• Notes the various internal stakeholder groups that will be involved in adopting and implementing the strategy’s key performance indicators.</li> </ul>
UBC	<ul style="list-style-type: none"> <li>• Strategy is directly tied to the university’s Kx Unit.</li> <li>• Notes the vision and mission of the Kx Unit.</li> <li>• Notes the reasoning behind using “Kx” (interactive, iterative, and multidirectional) and that Kx is one of four “innovation pathways,” alongside entrepreneurship, commercialization, and innovation partnerships.</li> </ul>
UOttawa	<ul style="list-style-type: none"> <li>• Include a vision and aspirations for KMb in the front matter.</li> <li>• Present a high-level summary of the findings from a needs assessment survey that asked UOttawa researchers how the university could best support their KMb efforts.</li> <li>• Notes a logic model was developed to guide the strategy’s implementation and evaluation.</li> <li>• Notes the development of a “K Mb hub” to facilitate networking.</li> <li>• Notes that Phase 1 of the strategy implementation focuses on health, social sciences, and humanities research, with Phase 2 expanding to include the natural sciences and engineering.</li> </ul>

*Note. Internal and external actors were recorded only when a reference to a specific individual or unit was made. Unclear descriptors such as “members of our university” were not recorded.*

implementation strategy expanding from health and social sciences to natural sciences and engineering. Only specific internal and external actors mentioned in the documents were recorded, excluding general descriptors.

## RQ2: Alignment of the Resources with Institutional Contexts

The alignment of KMb planning resources with institutional contexts and goals varied considerably across the four universities examined, reflecting their unique missions, values, and strategic priorities. All four institutions demonstrated a commitment to embedding KMb within their institutional frameworks. UAlberta and UBC explicitly linked their KMb planning to broader campus-wide initiatives like innovation, commercialization, and equity, diversity, and inclusion, and, in UAlberta's case, to the Truth and Reconciliation Commission of Canada. UBrighton and UOttawa, similarly, align their KMb efforts with institutional goals, with UBrighton drawing heavily on the UN Sustainable Development Goals and UOttawa using a survey of its research community to inform the customization of its KMb strategy. These connections suggest that KMb planning was generally not treated as an isolated activity, but rather intertwined with each university's mission and external commitments.

Despite these similarities, differences emerged in the depth and specificity of KMb resource utilization and strategic planning. University of British Columbia and UOttawa stood out for their inventories of resources and clear strategies for their utilization. University of British Columbia's KMb efforts were closely tied to structured training programs, impact tracking systems, and collaborations with external organizations like Research Impact Canada. UOttawa emphasized workshops, KMb tools, and performance indicators, providing concrete details about how KMb resources were allocated and assessed within the institution. In contrast, UAlberta and UBrighton offered fewer specifics about their KMb resource inventories and strategies for their use. UAlberta, for instance, presented a statement on research impact, but

lacked a detailed strategic plan for resource deployment. UBrighton also outlined general institutional goals and partnerships, but provided less clarity on the specific resources used to support KMb activities.

The degree to which KMb planning addressed stakeholder engagement and collaborative improvement also differed across the universities. UBrighton and UBC demonstrated a strong emphasis on engaging diverse stakeholders, including students, local and global partners, and community organizations. UBrighton's approach aligned KMb activities with global challenges, while UBC emphasized collaboration with non-academic partners, including Indigenous communities and policy makers. UOttawa promoted stakeholder engagement through its KMb hub and networking activities, but UAlberta's strategy lacked explicit mentions of external engagement mechanisms. These differences highlight the varying degrees of emphasis on stakeholder collaboration as part of institutional KMb strategies.

Finally, UBC and UOttawa distinguish themselves with a clear focus on the evaluation and the adaptation of KMb strategies over time. Both institutions treat their strategic documents as "living plans," regularly updated to reflect evolving institutional needs and external contexts. UOttawa developed detailed performance indicators and a phased implementation strategy, ensuring that its KMb efforts remained relevant and effective. University of British Columbia, too, underscored the importance of impact assessment, assembling working groups and developing tailored metrics to evaluate KMb success. UAlberta and UBrighton, while also committed to measuring research impact, provide fewer concrete details on how KMb strategies would evolve in response to institutional or societal changes.

## DISCUSSION

In this study, we examined the strategic KMb planning resources employed by four research-intensive universities—UAlberta, UBrighton, UBC, and UOttawa—each of which has developed distinct approaches to KMb

aimed at enhancing the societal impact of their research. Our findings provide insights for university administrators by shedding light on the variability of KMb planning and its integration into institutional structures.

A key insight from this study is the variability in how universities approach KMb strategic planning. While universities face increasing pressure to demonstrate societal impact, their responses to these demands differ considerably. Our analysis shows that institutions like UBC and UOttawa have developed detailed plans with clear resource allocations, training programs, and evaluation frameworks. In contrast, UAlberta and UBrighton have adopted more general approaches to KMb, offering fewer specifics about resource inventories and implementation strategies. This variability reflects the challenges highlighted in the literature regarding the conceptual vagueness of KMb and its uneven adoption across universities (Benneworth et al., 2018). Strategic planning must balance evidence-informed practices with the specific needs of local contexts. The issue, however, is that the evidence base on what constitutes “effective” KMb remains limited, and there is an attendant need for more research into how KMb can be successfully implemented across highly variable institutional environments. While earlier research has commented on the challenges for institutions lacking clarity about building KMb capacity (e.g., Bayley & Phipps, 2019a), our findings suggest that clarity is relatively well-established among institutions that produce formal plans. Instead, the challenges seem to arise more from gaps in commitment, connectivity, co-production, and competency development, which are elements that were unevenly addressed across the universities studied.

Another insight is the alignment of KMb with broader institutional goals, such as innovation, commercialization, and equity, diversity, and inclusion. The study found that some universities are positioning KMb as a core component of their institutional missions. UAlberta and UBC explicitly link KMb strategies to campus-wide initiatives and broader goals related to social and economic progress, reflecting the broader

trend in higher education policy to show how research investments lead to real-world impact (Pedersen et al., 2020; Smit & Hessels, 2021). This finding resonates with Reed et al. (2022), who describe enabling strategies that rely on strong institutional signals, but our analysis also illustrates that such alignment does not necessarily translate into concrete resource inventories or mechanisms. In this respect, our work conditions earlier typologies by showing how symbolic alignment and operational detail can diverge within the same institution.

Additionally, stakeholder engagement and social learning emerged as core elements in the KMb strategies reviewed, but the degree to which they were prioritized varied. University of British Columbia and UBrighton, for example, placed a strong emphasis on engaging external stakeholders, including students, local and global partners, and community organizations, aligning with the literature that recognizes the importance of partnerships in generating societal impact (e.g., Reed & Fazey, 2021; Reed et al., 2022). However, the others lacked explicit mechanisms for external stakeholder engagement, illustrating a potential gap in how universities implement KMb. This contrast supports Ferré et al.’s (2025) observation that enabling and achieving strategies can coexist but not always coherently. Whereas Ferré et al. (2025) emphasize tensions between project culture and impact culture, our findings suggest a parallel tension between rhetorical commitments to engagement and the operational supports needed to enact them. Social learning theory points to the value of collective learning and collaboration. It may be that universities with well-developed stakeholder engagement frameworks are more likely to achieve meaningful and sustained impact. Yet our results complicate this view by showing that even in institutions describing their plans as “living documents,” the processes for iterative learning and adaptation are often vague or underdeveloped. The findings suggest that greater attention to social learning and stakeholder involvement may be needed for KMb strategies to achieve their potential, but further research is necessary to explore how different models of stakeholder engagement influence

the success and sustainability of KMb efforts across institutional contexts.

This study also makes a theoretical contribution through its analytic framework combining the RBV, institutional theory, and social learning theory. These three theoretical perspectives provide a more thorough understanding of KMb strategic planning, offering new insights into how universities navigate the complexities of resource management, legitimacy, and collaborative learning in the pursuit of societal impact. Notably, our findings highlight that while resource-based considerations (e.g., inventories of tools and supports) were more developed in some cases, the institutional and social learning dimensions often lagged behind, suggesting that adopting all three perspectives in tandem can expose blind spots in planning that would otherwise remain hidden. Future research could further develop this combined theoretical perspective by applying it to a broader range of universities or different KMb contexts.

### Implications for University Administrators

This study amplified the message that effective KMb requires more than rhetorical commitments or isolated initiatives. For university administrators, one clear implication is the need to integrate KMb into the core systems that shape academic work. Embedding KMb expectations into hiring, promotion, and research awards can help ensure that impact is treated as a valued dimension of scholarly work. Administrators could also invest in dedicated infrastructure to sustain KMb, such as specialized units or hubs with clear mandates, resources, and staff to coordinate training, partnerships, and evaluation. This would provide a stable foundation and signal institutional commitment.

For KMb-oriented staff, the findings highlight the value of cultivating strong internal networks and building relationships that bridge disciplinary and organizational boundaries. Creating regular opportunities to share experiences and learn from peers can strengthen capacity and reinforce collaboration. Practitioners designing or updating strategies would do well to align ef-

forts with both institutional priorities and broader societal challenges. Positioning KMb as a contributor to goals like equity or innovation may help secure leadership support and encourage engagement. Finally, across all roles, there is a need to move beyond static plans toward adaptive approaches. Establishing mechanisms to assess progress, gather feedback, and revise strategies over time will help ensure KMb efforts remain relevant and responsive.

### Limitations and Conclusion

The primary limitation of this study is the focus on only four universities from the Research Impact Canada (RIC) network, which provides only a snapshot of the landscape of KMb planning in higher education. Additionally, the reliance on publicly available documents may have excluded relevant internal or unpublished resources further detailing each institution's KMb strategies. Finally, the study's emphasis on Canadian institutions, with the inclusion of only one international university (UBrighton), may limit the applicability of the findings to broader contexts. Despite these limitations, the study offers a foundation for understanding how universities articulate and operationalize KMb strategies in varied contexts. This research can inform more intentional, adaptive, and collaborative approaches to KMb and continue advancing the field, but continued inquiry and cross-institutional learning will be essential.

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