

## Educational Knowledge Brokerage and Mobilization: The *Marshall Memo* Case

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**Abstract** The importance of intermediation between communities primarily engaged in research production and those primarily engaged in practice is increasingly acknowledged, yet our understanding of the nature and influence of this work in education remains limited. Accordingly, this study utilizes case study methodology and aspires to understand the activities and signature product (the *Marshall Memo*) of a particularly influential mediator of current educational research, news, and ideas: Mr. Kim Marshall. The article also examines the memo's meaning to subscribing educators. Data analyses suggest subscribers greatly appreciate several aspects of the memo, which was found to draw from a wide range of source material that varies in terms of its research centredness and its practical implications.

**Keywords** Knowledge mobilization; Brokerage; Mediation; Boundary crossing; Evidence use

The drive to improve connections between research and practice is strong, including and extending beyond the field of education (Nutley, Walters, & Davies, 2007). In education, the research-policy-practice gap is a widely recognized problem (Hargreaves, 2000). If educators were more research engaged, many assume that teaching and learning improvements would follow. Support for this supposition is

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emerging (Goldacre, 2013; Supovitz, 2015). However, despite various efforts, it has proven challenging to broadly strengthen research-practice connections. Though several barriers are identifiable, at base are the substantial cultural and structural divides between those primarily inhabiting traditional research production and research-use contexts (Caplan, 1979). In the absence of large-scale, coordinated activities to join them, brokered connections are essential (Neal, Neal, Kornbluh, Mills, & Lawlor, 2015).

Accordingly, individuals and organizations inhabiting this in-between space are increasingly noted. Lubienski, Scott, and Debray (2011) described a vast network of intermediary organizations, many purportedly aiming to enhance decision-makers' use of evidence. Most, however, focus narrowly (e.g., promoting school choice reforms), strive to influence state/national policy (vs. local practice), and/or deliver messages driven more so by ideology than scientific evidence (Lubienski et al., 2011; Malin & Lubienski, 2015). In contrast, the present study centres upon a prominent broker and product that is broadly focused, designed for the educator, and positioned as impartial in its presentation of evidence.

Recognizing their vital role in the education sector and the scarcity of research into their work (Levin, 2013), we conducted a case study of Mr. Kim Marshall and his widely circulated<sup>1</sup> weekly product for K–12 educators, the *Marshall Memo*. This publication is developed from his review of numerous publications and a selection of material he deems will “have the greatest potential to improve teaching, leadership, and learning” (*Marshall Memo* LLC, 2017, n.p.). Three questions are addressed:

1. Why and how does Mr. Marshall mobilize knowledge via the *Marshall Memo*?
2. What are the features of knowledge that is being mobilized?
3. What does the *Marshall Memo* mean to subscribers (educators)?

Next, the article reviews literature about research use and engagement, emphasizing barriers and facilitators. It then describes work that partially illuminates brokers' roles and functions.

## Barriers to research engagement

Three barriers to research engagement stem from shortcomings related to accessibility, relevance, and timeliness (Hering, 2016). Regarding access, academic researchers—who collectively produce copious, often practice-relevant, research—primarily share their work passively, making it available via scholarly outlets (Cook, Cook, & Landrum, 2013). Yet, educators neither regularly consult the scholarly literature (for one, most journals restrict access [Coburn, Honig, & Stein, 2009; Saunders, 2015]) nor attend the same convenings.

Research also often fails to provide relevant, useable information (Lysenko, Abrami, Bernard, Dagenais, & Janosz, 2014). Scholars emphasize knowledge production (Firestein, 2012) and theory development (Ward, House, & Hamer, 2009), focusing less upon the concrete evidence that practitioners desire (Hering, 2016). Concerning timeliness, even relevant and useable information may be unavailable

when needed (Hering, 2016; Sarewitz & Pielke, 2007). These impediments and others (Malin, 2016) are not easily addressed without mediation.

### Facilitating research engagement: Brokerage

Given these formidable barriers, which individuals and entities could remediate them? They could, for instance, enhance access to or highlight relevant research, translate material, or facilitate research-practice linkages (see, for example, Coburn & Penuel, 2016, regarding research-practice partnerships). Thus, research-practice “connections” can be made and enhanced in different ways, ranging from the direct (e.g., researcher-practitioner interchanges) to the indirect (e.g., persons and artefacts that fill a structural hole and facilitate idea sharing). Indeed, research shows brokers’ key and varied roles in addressing research-practice gaps (Farley-Ripple, Tilley, & Tise, 2017).

Penuel and colleagues (2017) conducted a nationally representative survey of how school and district leaders access, perceive, and use research. Among their findings it was clear that respondents tended to possess strong appetites for research, and they reported frequent and varied research use. Respondents also tended to access research in indirect and mediated forms, for instance through their “professional connections” (p. 8), conferences, and/or state departments of education.

Several overlapping terms—e.g., brokers, intermediaries, and boundary spanners—have been employed to describe these individuals and entities in education (see Neal et al., 2015). Another distinction relates to whether scholars suggest brokers must or should privilege “research” evidence. This article is concerned with *knowledge mobilization* (KMb) (see Ward, 2016), accommodating a range of processes and activities that must not exclusively draw from research: e.g., practice-relevant knowledge translation, dissemination, linkage activities, and/or capacity building. Describing the individuals who engage in these processes, this article follows others (Ward et al., 2009; Neal et al., 2015) and uses the term “broker.”

Some research—albeit largely from outside education—now exists concerning brokers’ roles, functions, and preferred qualities. However, most focuses upon brokerage within research production and use contexts, rather than the mediation context (Levin, 2013) in which Marshall and others reside. As Tseng (2007) notes: “Intermediaries often play a significant role in interpreting, packaging, and distributing research evidence for policymakers and practitioners ... Given their central role in research use, [they] should receive more focused attention” (p. 18).

In an influential conceptual piece anchored in the healthcare sector, Ward et al. (2009) focused upon “knowledge brokers,” noting their potential to supply, “The missing link in the evidence to action chain” (p. 267) and describing their primary role: “to make research and practice more accessible to each other” (p. 268). Knowledge brokering, they stressed, can include multiple types of evidence (Ward et al.) and “can reside in individuals, organisations, or structures” (p. 268).

Early understandings of brokering flow from the private sector, where brokers have been encouraged to diffuse knowledge and fuel innovation (Roth, 2003; Ward, 2009). More recently, it has been applied to the public sector. Oldham and McLean (1997) proposed three frameworks for considering public sector brokering: knowledge system, transactional, and social change.

The knowledge system framework, designed to address structural barriers (Sin, 2008), highlights the broker's role in creating, disseminating, and/or translating knowledge. In education, the What Works Clearinghouse fits within this framework. Although frequently employed (Ward et al., 2009), knowledge systems approaches alone are insufficient to stimulate use (Levin, 2013). The transactional model focuses on strengthening relationships between knowledge producers and users, with brokers functioning as "intermediaries or linkage agents" (Ward et al., 2009, p. 4). Interpersonal contacts and communication are emphasized, based on the understanding that active dialogue, participation, and exchange are the best ways to stimulate knowledge use (Nutley et al., 2007). This model emphasizes networks and partnerships (Ward et al., 2009). The social change model is concerned with capacity building, for example, strengthening educators' abilities to identify, interpret, and conduct research. Networked improvement communities (Bryk et al., 2011) may exemplify the social change model.

Knowledge mobilization is promising but poses several challenges. First, it is time consuming and resource heavy (Contandriopoulos, Lemire, Denis, & Tremblay, 2010). Each model is uniquely taxing. A second challenge relates to the broker's role confusion and/or multiple roles (Ward, 2016). Finally, wide-ranging skills are needed. A knowledge system function, for instance, requires skill in gathering, appraising, and describing evidence (Robeson, Dobbins, & DeCorby, 2008), while linkage and exchange requires networking skills and cross-boundary credibility (Lomas, 2007). Generally, flexibility, inquisitiveness, and self-confidence are key broker attributes (Ward, 2009).

Lomas (2007) studied 400 "knowledge brokers" in the health sector and outlined a set of valued attitudes and skills:

1. Entrepreneurial (networking, problem solving, innovating);
2. Trusted and credible;
3. Clear communicator;
4. Understands the cultures of both the researcher and decision-making environments;
5. Able to find and assess relevant research in a variety of formats;
6. Facilitates, mediates, and negotiates; and
7. Understands the principles of adult learning.

Education researchers also highlight the centrality of trust and credibility for individuals engaged in Kmb or related activities. Asen and Gurke (2014) found school board officials judged not only the credibility and trustworthiness of evidence presented to them "but also the person presenting" (p. 61) it. Tseng and Nutley (2014) similarly describe the importance of relational trust, and Daly, Finnigan, Moolenaar, and Che (2014) found trust to influence the size and strength of brokering networks.

Recently, Ward (2016) developed a Kmb framework organized around four key questions. Foundational to the present study, it is detailed in the conceptual framework below.

## **Conceptual framework**

This study relies upon Ward's (2016) knowledge mobilization framework, developed

from a cross-disciplinary review of 47 knowledge mobilization models. It is organized around four questions: “Why is knowledge being mobilised? Whose knowledge is being mobilised? What type of knowledge is being mobilised? How is knowledge being mobilised?” (p. 1). Answers to these questions formed 16 subcategories. For instance, three categories emerge regarding knowledge types: scientific/factual knowledge, technical knowledge, and practical wisdom (Appendix 1).

Ward’s (2016) framework informed much of this analysis, but it does not address the qualities of summarized or translated material or key broker skills and qualities. Thus, this analysis also draws from Cordingley (2008), who suggests enhanced user uptake of research (and, presumably, other sources of knowledge) arises from various features, including: accessibility (physical); conciseness; and language that is clear and jargon-free. Hubers and Poortman (forthcoming) also suggest knowledge sharing that includes how-to schemas and/or explanations of underlying principles is more likely to stimulate uptake than that which is solely factual in nature. These and related findings guided this content analyses. It also draws from previously described research by Lomas (2007) and others that detailed several key qualities brokers ought to possess.

## Methods

Kim Marshall and the *Marshall Memo* were treated as a “case” of knowledge brokering, and perhaps mobilization, in education. A single case study (Yin, 2009) was thus conducted and numerous approaches were taken to address the research questions. Marshall was twice interviewed (2 hours, 58 minutes in total) and several clarifying emails were exchanged. As well, the contents of 15 *Marshall Memos* (116 items; spanning from April 4, 2016, to July 11, 2016) were analyzed. Marshall’s website was also content analyzed and its searchable archive investigated, and the researchers obtained and analyzed raw and compiled responses to a June 2015 survey of subscribers ( $N = 4,450$  respondents) that Marshall created and administered.

The first two questions were initially analyzed according to Ward’s (2017) framework, regarding *what*, *why*, *how*, and *whose* knowledge was mobilized. For each dimension, the desire to obtain deep understandings also moved the researchers to look elsewhere or develop additional measures (see Measures). For instance, regarding *what* knowledge, Farley-Ripple and Jones (2016) were built upon to categorize the “types” of sources Marshall drew from, and materials were further classified relative to their disciplinary bases. Similarly, regarding *whose* knowledge, the researchers ultimately moved beyond Ward’s five categories to provide a more detailed accounting of featured authors. Also, to more fully understand Marshall’s selection and transformation of material (illuminating the *what* and *whose* aspects), the researchers examined a subset of original and summarized materials side-by-side relative to length and other qualities (e.g., what was emphasized) while soliciting Marshall’s reflections.

Research question three (regarding the memo’s meaning to subscribers) was addressed via survey analysis. A random sample ( $N = 100$ ) of open-ended survey responses were initially classified the comments as positive, constructive, or mixed. Then, patterns were identified within the positive and mixed responses; this analysis began with the notion of different “problems” that the memo might solve for practitioners (e.g., related to time, access, relevance).

Throughout, the researchers concurrently pursued data collection and analysis and triangulated between sources (Yin, 2009). The second interview with Marshall included the sharing of emergent impressions and probing of discrepancies. The research team met and communicated repeatedly until attaining consensus.

## Measures

All original materials for which the researchers secured access ( $N = 114$ ; 97.4%) were classified by *source type* (e.g., peer reviewed, blog post, professional magazine), *peer reviewed* (yes/no), *article type*,<sup>2</sup> *accessibility* (freely accessible or not), and *number of references to peer reviewed research* (integer up to 10, or > 10). The original content was classified according to whether it *primarily drew from education or different field/s* and whether its *primary implications were for teaching and/or leadership*. The author/authors of each article were also tracked and their primary roles (e.g., academic, journalist) were classified. When possible,<sup>3</sup> *number of words* were recorded and *readability* (Flesch Reading Ease and Estimated Grade level, using Microsoft Word) were recorded. For all summary items in memos 631–645, *number of words* (excluding title, trailing information) and *readability* were recorded. The researchers also appraised how the memo content departed from the original.

## Limitations

This study is limited in two ways. First, the ability to generalize findings from case study research can be limited (Yin, 2009). This case may be unique in ways that limit its extension. Another limitation relates to the data from which we drew. To address the study's third research question (RQ3), we relied on subscriber survey results shared by Marshall, and were unable to calculate a survey response rate and to compare respondents to non-respondents. These groups may differ systematically.

## Case context

The *Marshall Memo*, published since 2003, is “A Weekly Round-Up of Important Ideas and Research in K-12 Education” (*Marshall Memo* LLC, 2017, n.p.). It is “designed to keep principals, teachers, superintendents, and other educators very well-informed on current research and best practices” (*Marshall Memo* LLC, 2017a, n.p.). Initially, Marshall focused entirely on school principals. Although they remain his top concern, his readership has expanded. He subscribes to more than 60 publications (*Marshall Memo* LLC, 2017b) and scans through many articles, ultimately choosing “5-10 that have the greatest potential to improve teaching, leadership, and learning” (*Marshall Memo* LLC, 2017a, n.p.). He avoids “breaking news” (Marshall, personal communication, June 16, 2016) or national policy-related material. He then crafts article summaries, provides e-links to originals (when available), and highlights some quotes. The memo also includes a set of “short items” containing e-links. Meant to be readable within 20 minutes, it is delivered via email to subscribers each Tuesday (Word or HTML format; a podcast version is also available). Memo subscribers also have web access to a member's area that includes prior issues and a searchable archive, and denotes “classic articles.” An individual subscription costs \$50. Bulk pricing is available.

Marshall operates semi-independently, with a part-time assistant and informal support from his spouse (proofreading and discussion). His website bio emphasizes his longstanding educational engagement and his education writings. He worked for many years in Boston public schools, including 15 as a principal, six in central office, and nine as a teacher. He now works as a leadership coach with New Leaders, an alternative leadership preparation provider. Also, he delivers “around 100 full-dress workshops” each year, coaches principals, and provides other consulting services (personal communication, April 13, 2017). He holds an undergraduate degree from Harvard College, an M.Ed. from Harvard Graduate School of Education, and an honorary doctorate from Harvard. Earlier, he attended public (Washington, DC) and private schools in the U.S. and the United Kingdom.

## Results

In this section, study results are detailed by research question.

### ***Why mobilize knowledge?***

While working as a K–12 educator, Marshall experienced intense time demands and professional complexities and, upon completing his final principalship, pursued an instinct that he could partially address such strains by producing an informative, concise, and useful publication for educational leaders:

I [had] a strong feeling that most people in schools don't have time to read ... I was trying from the very beginning to bridge this gap between the very busy 24-7 world of school leaders and superintendents and all this great literature that is out there, so that was ... the mission.<sup>4</sup>

Marshall launched the memo with networking support and seed money from two friends/colleagues. Initially, Marshall recalls, there “couldn't have been more than ... 115 people.” From the beginning, the memo was delivered weekly and core concepts remain, with some evolution and enhancements over time (e.g., searchable archive, podcast). Over time, the memo became an integral part of Marshall's post-public school career.

Marshall confines his memo work to two intense days weekly: Sundays entail reading and selecting articles, and Mondays entail writing, revising, and initiating the dissemination process. He has developed a sustainable routine.

Relative to Ward (2017), Marshall's topmost aspiration appears to be to *change educators' behaviours and practices*. Proximally, he is aiming to address two problems/issues he believes they face (time and access issues). Also, broadly interpreting the *why* question, Marshall is aiming to enhance busy educators' *access* to professionally meaningful information as part of a for-profit business.

### ***What and whose knowledge?***

Here original and memo content analysis were primarily relied upon, with interviews providing clarifying insights. Analyzed memos included 116 “full summaries” (*Mdn* per memo = 8). Initially, materials were analyzed per Ward's (2017) categories (see Appendix 1), and then expanded. Relative to *what* knowledge, Marshall emphasized each of Ward's identified knowledge types (scientific/factual, technical

knowledge/skills, and practical wisdom), with none clearly preferred but with many selections featuring an integration of knowledge forms. Relative to *whose* knowledge, Marshall primarily drew from professional knowledge producers and from journalists (the latter falling outside Ward’s framework).

Marshall noted his memo reflects a three-layered selection process, including: a) the publications he subscribes to; b) the articles and items he elects to feature; and c) his choices regarding how to summarize or translate. Each decision point is detailed below.

First, regarding his publication subscriptions, Marshall leans “heavily toward practical versus theoretical, actionable versus policy-oriented” publications. Marshall also lists (*Marshall Memo* LLC, 2017b) the frequencies with which he has drawn from these sources (and others; he sometimes includes other material) since the memo’s inception. His top sources are *Education Week*, *Educational Leadership*, *Phi Delta Kappan*, *NYT*, and *Principal Leadership*. *The Reading Teacher*, a peer-reviewed journal, is eighth.

Second, Marshall’s weekly selections are guided by “the same criteria.” He further delineates qualities he seeks: “does this message make sense to a principal? Is it helpful? Is it something that they should be thinking about? Does it reinforce important things?” He also seeks to discern “what’s been said many times (skip those) and what’s new or has a different slant” (personal communication, October 7, 2017).

Marshall pointed to a *Cult of Pedagogy* article (Gonzalez, 2013) to illustrate what he appreciates. Author Jennifer Gonzalez described how, when teachers have a couple of eager discussion participators, they may falsely conclude it was a success. Gonzalez described her own struggles before introducing several strategies for generating more meaningful discussions.

**Table 1. Frequency table representing source types of original articles**

| <b>Source Type</b>                          | <b>N</b> | <b>Percent</b> |
|---|----------|----------------|
| Peer-reviewed journal                       | 21       | 18.1           |
| Traditional news (broad)                    | 20       | 17.2           |
| Education-specific news                     | 18       | 15.5           |
| Professional organization, periodical       | 17       | 14.7           |
| Professional magazine, education            | 16       | 13.8           |
| Professional magazine, non-education        | 6        | 5.2            |
| Think tank/advocacy organization            | 5        | 4.3            |
| Consultant-based material (direct)          | 5        | 4.3            |
| Education foundation                        | 4        | 3.5            |
| Non-peer reviewed, working paper, or report | 3        | 2.6            |
| Book  | 1        | 0.9            |

Marshall’s item selections during the studied timeframe were broad, drawing from 52 sources that formed 11 categories (Table 1). Twenty-one of 116 (18.1%) items drew from peer-reviewed journals, and three more (2.6%) represented National Bureau of Economic Research (NBER) working papers or government-commissioned reports. Traditional news sources (e.g., the *New York Times*; 17.2%), education-specific news (e.g., *Education Week*; 15.5%), publications produced by professional or-



ganizations (e.g., the Association for Supervision and Curriculum Development’s [ASCD] *Educational Leadership*; 14.7%), and professional magazines (e.g., *Phi Delta Kappan*; 13.8%) also appeared frequently. The most common sources were *Education Week* (11), *Educational Leadership* (10), and the *New York Times* (10).

Although many original articles were accessible, just 24 (21%) appeared in “open access” outlets, underscoring that Marshall is, indeed, enhancing educators’ access. He reads broadly, noting “the good stuff ... is so widely scattered,” and expressing, “I want my readers to have access to every good piece of educational thinking or practice or research that’s out there.”

Classifying the original material by the type of structure and the argument it made, eight categories were identified (Table 2). The majority of articles (62%) were classified as *conceptual/theoretical/advocacy*; eight percent of these appeared as op-eds for major news outlets such as the *New York Times* or the *Atlantic*. The next most frequent categories were: *descriptions of practice*, *empirical articles*, and *journalism/reporting* (Appendix 2).

**Table 2. Classification of original articles by structure/argument**

| Type   | N  | Percent |
|--|----|---------|
| Conceptual/theoretical/advocacy                      | 71 | 61.2    |
| Description of practice                              | 11 | 9.5     |
| Empirical  | 11 | 9.5     |
| Journalism/reporting                                 | 8  | 6.9     |
| Review of literature                                 | 6  | 5.2     |
| Derivative   | 4  | 3.4     |
| Unclassified – could not access                      | 2  | 1.7     |
| Academic critique of article or response to critique | 2  | 1.7     |
| Crowdsourced ideas from practice                     | 1  | 0.9     |

Marshall reflected: “I love the pulled together stuff.” Although he also selects some empirical studies, he notes they “tend to be too narrow.” By contrast, “the reviews ... the meta-analysis type [articles], they’ve done a lot of work for me, and that is really helpful.” Marshall has become increasingly efficient.

Marshall also described his personal and professional perspective, acknowledging that it shapes his selections. He noted studying with an effective schools pioneer and described his own enduring interest in closing the achievement gap. He described himself as a progressive educator, noting, “I have some strong views ... but ... I try to be fair minded.” He also reflected, “There’s definitely a Kim Marshall perspective [in the memo], and that is actually what people are paying for. They’re trusting that my eye ... is a good eye.”

Nearly 75 percent of articles drew primarily from education. An additional 10 percent plus drew primarily upon psychological topics (e.g., motivation, grit). Marshall claimed subscribers appreciate articles “with a very broad social psychological perspective.” About 42 percent of articles were primarily leadership-relevant and 45 percent were primarily teaching-relevant.

We also identified the number of direct references to scholarly research within original articles. Their explicit research bases varied: In 34.5 percent of cases, 10 or

more research references were identified; in 29.1 percent, there were zero. Some authors referenced research sparingly but strategically. For instance, two academics co-writing an op-ed for the *New York Times* referenced and linked to just two studies, but one was a comprehensive review of pertinent research. Thereby, the authors efficiently supported a broad claim. Additionally, non-empirical pieces frequently employed a multistage research referencing process. For instance, an *Education Week* article about the efficacy of one-to-one laptop initiatives linked to a separate *Education Week* article that included a summary of related research.

The memo, Marshall indicated, was never intended to draw solely from academic research. Describing material he featured that encourages educators to collectively perform Stack Audits (a homework review method; we agreed this was not a research-validated intervention), Marshall noted,

I'm not waiting around for researchers to validate that. I assume it would be. I just think that I'm floating that out there. I'm putting that out there, saying, "What do you think of this?" I hope a lot of people pick up on that.

Regarding the affiliations and roles of article authors (Table 3), 49.1 percent of items were partially or solely authored by academics/researchers, followed by education journalists or editors (12.9%), and education authors/consultants/former educators (12.1%).

**Table 3. Original article authors, by professional role**

| <b>Role</b>                                    | <b>Frequency</b> | <b>Percent</b> |
|--|------------------|----------------|
| Academic                                       | 57               | 49.1           |
| Educational journalist or editor               | 15               | 12.9           |
| Educational author/consultant/former educator  | 14               | 12.1           |
| Educational practitioner (current)             | 10               | 8.6            |
| Non-educational journalist or editor           | 9                | 7.8            |
| Think tank/Advocacy organization, professional | 3                | 2.6            |
| Mixed authorship team (academic/consultant)    | 2                | 1.7            |
| Mixed authorship team (academic/practitioner)  | 2                | 1.7            |
| Writer/journalist (outside education)          | 2                | 1.7            |
| Non-educational author/consultant              | 1                | 0.9            |
| Poet/essayist                                  | 1                | 0.9            |

The third level of selectivity/discretion occurs when Marshall creates summaries or translations. Here he aims to:

do an intellectually responsible job capturing the essence of the article in ¼ of the words (more or less), getting the authors' ideas across in as few words ... and as vividly as possible – including stories, good quotes, and results on student learning where possible (personal communication, October 7, 2017).

He assumes "if it's too long, people won't read it, and if it feels too abstract, 30,000 feet, or detailed, they'll tune out or lose the main message." He rarely inserts his voice, unless he "feels it necessary to lay [his] cards on the table and state an opinion

that's contrary to the authors' or point out something that [he thinks] was missing." (personal communication, October 7, 2017).

Our review of articles was consistent with Marshall's reflections. For example, Marshall's opinion was rarely observable; one exception was regarding a teacher evaluation study, in which Marshall described several concerns ("There were several important questions the researchers didn't ask;" *Marshall Memo* 642, 2016, p. 5) and suggested these flaws explained the results.

We also noted Marshall's liberal use of quotations within concise and variable individual summaries ( $M = 561.41$ ,  $SD = 348.54$ ). Reflected Marshall,

It [strikes] me that sometimes a 45-page *Teachers College Record* article, I do in half a page because that's the substance ... a fairly simple, important point. With Ron Ferguson's [article] this week, his was a 67-page paper and I think I took five pages to do that one.

Marshall also tended to emphasize practical applications while de-emphasizing methodological details. He generally "trust[s] that any article in a peer-reviewed journal" is methodologically sound, enabling him to skim some portions and focus more on utility.

The readability of *Marshall Memo* summaries (Reading Ease:  $M = 42.66$ ; Grade Level:  $M = 12.42$ ) tended to be lower than that found within original material (calculated when possible,  $N = 61$ ; Reading Ease:  $M = 51.1$ ; Grade Level:  $M = 10.9$ ). This finding may reflect the task's awkwardness (e.g., "In this *Chronicle of Higher Education* article, Rob Jenkins [Perimeter College of Georgia State University] reflects on ..."; *Marshall Memo* 643, June 27, 2016, p. 5). Full memos ranged from 11 to 14 single-spaced pages.

## How is knowledge mobilized?

Regarding *how* Marshall mobilizes knowledge, his dominant method is to disseminate. Some efforts may support knowledge synthesis as well; he often selects material that is broad (synthesized) in nature, and his search engine could aid educators wishing to explore particular topics. He also faintly seeks to make connections and broker relationships and encourages interactive sharing. Significant numbers heed this advice; meaning he/it may be a hub for what becomes a larger network. More detail is provided below.

Trailing most items, Marshall shares authors' email information with subscribers, inviting connections. Related, Marshall noted he frequently engages with subscribers regarding memo content, though we did not learn the frequency or impact of these occurrences. Marshall's educational consulting connects him with practitioners, informing his memo-related work. His interactions with research communities are less frequent. He also described connections to some academics and policymakers (e.g., former U.S. Secretary of Education John King, a friend and subscriber), and noted that "80–90" U.S. Department of Education employees were memo subscribers in mid-2016, and "all key staff" at Massachusetts' education department.

Marshall's communications and pricing structure reflect his desire to increase the use of the material he shares, showing he views structured sharing and dialogue as a route toward enhancing use. In an email, for instance, he encouraged subscribers to have a teacher team or whole staff "read a summary 'live' ... and then discuss, per-

haps using a protocol, about implications.” As a school principal, Marshall noted he was “big on sharing articles with people” and he had:

this blithe assumption that people would read them ... and act on them. It turns out that most people don't do that. That's why I am periodically reminding people and pushing people in the *Memo* to set up a protocol discussion of an article in a faculty meeting and to do some follow up because people can read stuff and then nod and then move on and not do anything ... That's why I ... encourage people to give it to teacher teams, have people actually read it and do a structured protocol.

Survey responses suggest many subscribers “clip and share *Marshall Memo* summaries with colleagues”—on this closed-ended item, 13.6 percent said they do so “nearly every issue,” 32.3 percent “fairly often,” and 41.9 percent “occasionally.” Among those who share, emailing or giving hard copies is most common (83.8%), although nearly one-quarter reported facilitating readings and discussions, 11.7 percent discuss it in study groups, and 8.3 percent use social media. A large share of respondents admitted forwarding the *Memo* to colleagues, although this is prohibited. Thus, although the *Memo* initiates as one-way communication, it often stimulates further communication *within* educational organizations, positioning its subscribers as brokers as well.

Marshall has considered but refrained from utilizing social media. What “holds me back most is time,” he notes, and he wonders how to handle sharing subscription-based material. He has heeded advice from a trusted social media expert that the memo has a particular identity and may be better without social media presence.

### **Meaning of *Marshall Memo* to educators**

To address this question we relied especially upon a random sample ( $N = 100$ ) of open-ended responses to the survey item, “What does the *Memo* mean to you? And do you have suggestions ... [improvement]?” Of these, 95 percent contained some positive information. Focusing upon these, seven categories were extracted relative to its perceived value. Most frequently ( $N = 72$ ; 79.1% of classifiable responses) the *Memo* was appreciated for helping subscribers to *stay abreast of current educational thinking* (or, some referred to “research,” “trends,” and “information”). Frequently made explicit was that Marshall was valuably saving their time. Expressed one:

The *Memo* ... is a great way to stay on top of professional reading and current events without having to spend time scouring the internet for [it]. I feel as though you have already done the hard work of sifting through the overwhelming amounts of information out there and narrowing it down to the best of the best.

Several such respondents noted they frequently encounter pertinent and timely information. Likewise, on a separate survey item, 32.1 percent of respondents indicated the articles summarized are “exceptionally helpful and intriguing” and 64.8 percent indicated they are “relevant and interesting.”

Eighteen (19.8%) respondents valued the memo for *facilitating the sharing of professional ideas*. Noted a department chair, “It’s been a great way to initiate collegial conversations in the departments.” Another respondent expressed, “I love having conversations about the literature.” Eight (8.8%) respondents noted they appreciate reviewing the memo, then *further investigating what is most applicable* (e.g., it is “a good jumping off point”). This type of use aligns with Marshall’s view that it can serve as “tailored PD [professional development],” provided that readers “follow up on” what they find most pertinent. Responding to a separate item, nearly 60 percent reported that they “click on e-links and read the full article or access other information,” “quite frequently” (47.2%) or “almost every time” (12.3%).

Four respondents noted the *Memo* made them feel part of a learning community; said one, “The *Memo* makes me feel part of a community of international school leaders and innovators.” Four expressed that the *Memo* is professionally stimulating (e.g., “thought-provoking,” “reminds me why I love what I do”). Finally, two described how the *Memo* helps them to refine their professional philosophy and/or engage in continuous professional reflections, and two described how the memo tended to validate or reaffirm their educational thoughts or beliefs.

When asked to “describe the impact of reading the *Memo*” on their work, 24 percent indicated it is “a major enhancement: I have used a number of ideas . . .” and 74.4 percent characterized it as “very informative; makes me feel on top of the research.”

Regarding how *Memo* information is used, open-ended responses were usually non-specific. In two instances, material was said to validate existing thinking, and two more indicated it to be thought- or reflection-provoking. Asked to describe how he believes the *Memo* is used, Marshall suggested: “it’s provoking new thinking, it’s affirming things that they’re doing already that are good. It’s giving them ideas that they can pass along.”

## Discussion

This study examines an educational knowledge broker’s process and product. We address three research questions, drawing especially from Ward’s (2017) knowledge mobilization framework. Here we reflect upon findings, make recommendations, and describe implications.

Marshall’s product is highly valued by many subscribing educators. Its long-standing existence underscores that a market exists in education for knowledge that can influence practice (Brown, 2014). Addressing *why* knowledge may be mobilized, Ward focused on practical impacts individuals/organizations sought to make and identified five; most also were evident in this case. We suggest this question also can be interpreted more expansively, fully considering what might justify or motivate ambitious, time-intensive brokerage activity. Here, for instance, it is key to note Marshall produces a weekly memo on behalf of paying customers (educators). Related, Contandriopoulos and colleagues (2010) concluded their cross-disciplinary review of knowledge exchange by recommending further research into the “cost-sharing equilibrium” (p. 10) between users, producers, and intermediaries.

Marshall’s product seeks to address barriers to research use (Nutley et al., 2007), especially those related to access, time, and relevance. He attends both to physical and

cognitive/linguistic access, tailoring his focus and language. He scans much material and, on busy educators' behalf, he selects what he believes stands out. He also provides concise summaries, and the links enable further pursuit of select material. The website search repository also includes a way to find accumulated topical information.

Prior research suggests new knowledge is most likely to be “used” by educators when it flows through social relationships (Daly, 2010) and pre-existing communication channels (Neal et al., 2015), and when exchange processes become culturally embedded (Brown & Malin, 2017; Datnow, Park, & Lewis, 2013). Some of Marshall's actions (e.g., his sharing suggestions) show that he aims to promote such engagement, and extend the memo's influence. Many respondents are apparently doing so: more than 3,500 (~80%) indicated they at least occasionally share portions with colleagues.

The brokering chain often did not begin with Marshall; he frequently drew from material written by individuals functioning as brokers. Accordingly, we echo the call by Farley-Ripple and colleagues (2017) for scholarship that aims to better understand *brokerage* (versus brokers), “a dynamic and complex set of actors, activities, motivations within which research is exchanged, transformed, and otherwise communicated” (p. 13). Certainly, some individuals occupy especially influential positions—Marshall appears to be a liaison broker (Gould & Fernandez, 1989), and the access he provides to *selected* knowledge shows a gatekeeping function. Many of Marshall's subscribers, formal K–12 leaders, are also positioned as gatekeepers.

If the *Memo* is a tool for which use should be maximized, more could be done. One-way communication (from various sources, via Marshall, to subscribers) characterizes *Memo* delivery. Marshall's work could be adjusted to align with research suggesting interactive exchange strategies are more likely to stimulate research-based action (Hubers & Poortman, 2017; Levin, 2013). Specifically, efforts to increase educators' and research producers' interactions—e.g., social media engagement, a forum space, invited subscriber descriptions of how they applied ideas—would probably increase engagement with material. As structured, most sharing is occurring *within* schools and organizations; improvements would include sharing beyond organizational boundaries (Daly, 2010) and connections between researchers and practitioners.

Marshall intended to increase the actionability of ideas by a) exposing practitioners to information they likely would not otherwise have come across; and b) presenting the materials in appealing ways. We note he strongly favours already integrated materials, i.e., those that include how-to schemas and underlying principles and are therefore more amenable to uptake (Hubers & Poortman, 2017). However, ideas and findings may be applicable or actionable in one context, but ill-advised in another. To Marshall, part of the product's value is that subscribing educators can make those determinations and, as desired, dig deeper into relevant topics. We propose more scholarship is needed to understand (or complicate) educational actionability.

It is key to understand that knowledge brokering is not neutral. Brokers must make choices regarding both what to feature and how; unvaryingly they will not possess complete knowledge of what exists, plus they might gravitate to certain topics and perspectives. Marshall aims to be comprehensive in his search, an impossible

ideal though maybe still a worthy aspiration. His eye is key, a fact Marshall understands: the memo's value, he realizes, hinges on his perceived credibility to perform this selection function and, indeed, subscribers conveyed trust in his abilities and reinforced the relevance of his selections. As Willingham (2012) summarized, we tend to trust people who are like us. A person with deep practical experience could indeed be well-positioned to judge the value of wide-ranging material. An experienced school administrator and now a consultant, Marshall understands the "culture of practice"—including subtle communication norms pertinent to translation (Hammersley, 2014) and frequently held philosophies that affect the likelihood ideas will be accepted (Schneider, 2014). Notwithstanding, idiosyncrasies influence all brokers' selections to some degree. Accordingly, readers of this article and/or subscribers of the memo might seek to discern for themselves (e.g., *whose* and *what* knowledge) whether coverage-related tendencies or clear omissions are apparent. In this vein, it is commendable that Marshall surveys his readers biannually; among survey items, he asks subscribers about his selections, and whether and how they detect bias.

We conclude with a few observations. First, the memo does not exclusively address empirical research or systematic research reviews, instead drawing from varied knowledge sources. Some might interpret this as a flaw and, indeed, this mixture with no clear demarcation of boundaries has the potential to mislead. The trust placed in Marshall due to his shared background perhaps heightens this risk. Accordingly, we suggest that a labelling structure for summarized material could help readers better weigh its relative merits.

Relatedly, empirical research is sometimes placed at the top of the "knowledge hierarchy," and accordingly one may question the helpfulness of a product that runs the knowledge gamut. We do not take this position. As Levin (2013) notes, research is incapable of providing "recipes that can be blindly applied to practice. In many areas, there is simply not enough clear research knowledge to guide practice" (p. 16). Wang and Bowers (2016) note an underlying tension in educational leadership (the field in which Marshall is most firmly entrenched) between openness to, and empirical scrutiny of new ideas. Marshall's work may be seen as an attempt to balance this tension.

Marshall's time-delimited approach to memo work necessitates efficiency, and he applies shortcuts. For example, he assumes the design and methods of peer-reviewed studies are sound, and therefore focuses primarily on practical implications. The quality of peer-reviewed published research varies, though, and findings from research studies are invariably method- and context-sensitive (e.g., measurement, instrumentation, setting, participants, details regarding implementation). Marshall's wide focus places him in a challenging position. As Willingham (2012) notes, evaluating a study requires both an understanding of research design principles and "knowing the relevant *scientific content*" (p. 20). Willingham clarifies, however, that a person could become a sophisticated research consumer without also being a professional researcher. Notwithstanding, an ideal configuration may include a diverse team of researchers and practitioners collaboratively making selections, translating and synthesizing materials, and facilitating exchange processes. However, brokers

understandably act partially based on cost-benefit considerations (Contandriopoulos et al., 2010) and might reject certain designs as unfeasible.

For educators, we hope this article highlights the important function of individuals and entities residing in education's mediation context and aiming to enhance practice. We encourage educators to seek them out vigorously but cautiously, evaluating their work and considering their backgrounds and motivations. The four-step process outlined in Willingham's (2012) *When Can You Trust the Experts?* may be particularly helpful for making these appraisals.

## Notes

1. According to Marshall (personal communication, August 18, 2016), the *Marshall Memo* is the third-largest U.S.-based education publication, trailing only the *American Federation of Teachers' American Educator* and ASCD's *Educational Leadership*. Marshall declined to provide subscriber numbers but offered there are "tens of thousands of subscribers."
2. Building from the four categories utilized by Farley-Ripple and Jones (2016), eight categories ultimately were identified.
3. For the shorter pieces ( $N = 60$ ; 51.7%), original materials were copied and pasted into Microsoft Word.
4. For quotations (like the one noted here) obtained via formal interview, we do not provide full attributions in text. When quotations were obtained via email communications, by contrast, full attributions are provided.

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## Appendix 1. Summary of Ward's 2016 knowledge mobilization framework, by question

### *Why is knowledge being mobilized?*

1. Develop solutions to practical problems
2. Develop policies/programs or recommendations
3. Implement defined policies and practices
4. Change practices and behaviours
5. Produce useful research/scientific knowledge

### *Whose knowledge is being mobilized?*

1. Professional knowledge producers
2. Frontline practitioners
3. Members of the public/service users
4. Decision-makers
5. Product/program developers

### *What type of knowledge is being mobilized?*

1. Scientific/factual knowledge
2. Technical knowledge/skills
3. Practical wisdom

### *How is knowledge being mobilized?*

1. Making connections/brokering relationships
2. Disseminating and synthesizing knowledge
3. Interactive learning and co-production

## Appendix 2. Example of article fitting into each category

**Conceptual/Theoretical/Advocacy (61.2%):** “Graduating and looking for your passion? Just be patient” —Angela Duckworth, the *New York Times*, June 4, 2016

**Description of Practice (9.5%):** “The techy teacher / Five tips for avoiding technology overload” —Catlin Tucker, *Educational Leadership*, May 2016

**Empirical (9.5%):** “Classroom composition and measured teacher performance: What do teacher observation scores really measure?” —Matthew P. Steinberg & Rachel Garrett, *Educational Evaluation and Policy Analysis*, June 2016

**Journalism/Reporting (6.9%):** “What teens resent: Classrooms controlled by students rather than teachers” —Maureen Downey, *The Atlanta Journal-Constitution*, June 2, 2016

**Review of Literature (5.2%):** “Ask the cognitive scientist: Grit is trendy, but can it be taught?” —Daniel T. Willingham, *American Educator*, Summer 2016

**Derivative (3.4%):** “High school coursework seen falling short: Report finds few graduates ready for colleges, careers” —Catherine Gewertz, *Education Week*, April 13, 2013

**Academic Critique of Article or Response to Critique (1.7%):** “Risks and consequences of oversimplifying educational inequities: A response to Morgan et al. (2015)” —Russell J. Skiba, Alfredo J. Artiles, Elizabeth B. Kozleski, Daniel J. Losen, & Elizabeth G. Harry, *Educational Researcher*, April 2016

**Crowdsourced Ideas from Practice (0.9%):** “17 Ways to help students with ADHD Concentrate” —Youki Terada, *Edutopia*, August 14, 2015