



**John R. M. Gordon**  
Goodes Hall, Room 223  
Queen's University  
Kingston, Ontario  
K7L 3N6

October 22, 2008

Ms. Georgina Moore  
Secretary of the University  
University Secretariat  
Queen's University  
Kingston, ON K7L 3N6

Dear Ms. Moore

In accordance with the Senate Procedures Governing the Establishment, Reporting and Review of Centres; Institutes, and other entities at Queen's, a Review Committee was appointed by Dean David Saunders to review the operation of the Monieson Centre and to advise him on the present state and future prospects of the Centre.

A notice announcing the establishment of the committee, and its terms of reference, was placed in the Gazette on May 12, 2008 and members of the University community were invited to send comments to the committee. Other key stakeholders were also contacted directly and invited to comment. In addition an email survey was conducted within the School of Business inviting all faculty and staff to submit their comments. The committee met three times between June and October. The results of their deliberations and their recommendations are provided in the Report to Senate attached below.

I am pleased to submit to Senate the Report of the Review Committee with a recommendation that:

The Monieson Centre be authorized to continue for an additional five years, November 27, 2008 to November 27, 2013.

Yours sincerely,

John R.M. Gordon  
Chair

Review Committee on the Monieson Centre

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QUEEN'S UNIVERSITY

## **Report from the Review Committee on the Monieson Centre at Queen's School of Business**

**October 22, 2008**

### **Membership of the Review Committee and its Activities**

Members of the Committee:

- J. Denford, PhD Candidate, School of Business
- B. Donald, Faculty, Dept. of Geography
- S. Marlin, Associate Vice Principal, Research
- N. McEvoy, Chairman, Advisory Board, Monieson Centre – Ex officio
- B. Pazderka, Faculty, School of Business
- L. Ross, Dean's Office, School of Business
- J. Gordon, Professor Emeritus, School of Business – Committee Chair

M. Boisvert, Program Assistant, Monieson Centre provided support to the Committee.

Establishment of this committee with its terms of reference was announced in the Gazette, May 12, 2008. Members of the Queen's community were invited to submit their comments on the Centre to the committee by June 27, 2008. The mandate of the committee was to review the goals and objectives of the Centre, to make recommendations on the Centre's future, and to communicate its recommendations in a final report to Senate.

The committee undertook:

1. To review the documents provided by the Centre. These included annual reports, lists of publications and activities, the strategy as outlined in the last annual report, financial summaries and documentation related to the creation of the Centre. Details of this documentation are outlined in Appendix A.
2. To solicit views from the Queen's community and key stakeholders via the following:
  - a. An announcement in the Gazette, as mentioned above.
  - b. A survey and invitation to the School of Business electronic listserv (including all faculty and non-academic staff).

- c. Individual letters to Queen's administrators, members of the three Advisory Boards associated with the Centre, Fulbright Scholars and private sector partners that have been involved with the Centre.
  - d. Personal interviews with a number of administrators, staff and faculty who had direct involvement with the Centre.
3. To consider the available information to assess the financial viability of the Centre, how the Centre has met its original mandate, and future prospects for the Centre.

The committee met three times between June and October and communicated electronically various times between meetings. Additionally, Committee members conducted interviews with key Centre stakeholders listed above.

**The Committee recommends that the Monieson Centre be renewed for another five years.**

## Background of the Centre

The Centre was created by Queen's University Senate on November 26, 1998 as a Centre within the School of Business. Its original mandate, as specified in the November 5, 1998 submission to Senate for the creation of the Centre, was to direct research in the management of knowledge-based enterprises (KBEs) by undertaking three activities:

1. Knowledge production – gaining an understanding of how best to manage KBEs.
2. Knowledge transmission – sharing this knowledge with others through academic and practitioner channels.
3. Knowledge diffusion – assist both the public and private sectors of the economy in effectively transferring this knowledge into practice.

The Centre is physically located within the School of Business and has grown from having a part-time Director with no staff to the current structure where the Director is 60% full-time and there are three staff members, working full time.

Correspondingly, the number of activities has grown rapidly during the first ten years. In order to assess how successful the Centre has been at meeting the various components of its mandate, the activities were reviewed and are summarized below.

## Activities of the Past 10 Years

Appendix B contains a detailed list of the activities during the past ten years (prepared by the Centre to assist the Committee). Appendix C contains a detailed list of activities currently underway in the Centre as well as those planned for the future as reported in the most recent Annual Report of the Centre to the Dean of the School of Business. In particular the following are the key activities in which the Centre is actively engaged, and the facilities it provides:

- Collaborative Research. This is an effort to engage faculty from the School of Business, other Queen's faculty, faculty from other universities and public and private sector partners.
- Fulbright Scholars Program. It sponsors longer period visits of U.S. scholars to work with faculty, and graduate students.
- Visiting Scholars Program. This initiative enables scholars from Canada and elsewhere to work at the Centre and interact with faculty and graduate students for varying periods of time.
- Knowledge Exchange Seminars. These are organized periodically to foster scholarship in areas consistent with the Centre's activities.
- Sponsorship of theoretical and applied research. Currently, it focuses on three major research themes:
  - Knowledge-based Healthcare
  - Knowledge-based Regional Economic Development
  - Private Sector Knowledge-based Enterprises

- Faculty and Graduate Student Research Competitions. This is an internal competition for the Centre's research funds; its major objective is to provide "seed money" so that the applicants can pursue external research grants.
- Generating Research Proposals. The Centre is actively engaged with the Queen's community, academic community outside Queen's, as well as private sector and government entities for the purpose of identifying suitable research topics and sources of funding.
- The Monieson Library. This facility subscribes to selected business periodicals and is available to all interested parties.
- Conferences directed at specific knowledge-based sectors or themes. These are more formal and invite presentations of more fully developed research projects than the Knowledge Exchange Seminars described above.
- Publications. The Centre assists researchers with preparation and dissemination of work related to its activities.
- Marketing and Communications. The Centre's website, [www.business.queensu.ca/knowledge](http://www.business.queensu.ca/knowledge), offers an in-depth look at the collaborative research model and its benefits to researchers and industry and government partners. In addition to regular mailings to scholars, practitioners, and students, the Monieson Centre's semi-annual newsletter is widely distributed throughout Queen's and partner communities.

## **Observations**

The Centre was initially focused on research in the management of knowledge-based enterprises but was renamed The Monieson Centre to recognize the contributions of Professor Monieson to the School and management education. The mandate/strategy/positioning of the Centre has evolved over ten years to encompass a broader perspective and a larger audience of stakeholders and researchers. This evolution has, in part, been a function of the interests and backgrounds of the three individuals who served as directors to date. Although established as a School of Business based centre, it now has a broader outreach to other faculties and universities. The research itself spans not just pure/academic themes but also applied/clinical themes involving both the private and public sector.

The financial viability of the Centre appears to be robust because of a substantial endowment and the Centre thus does not represent a drain on the School or the University. It currently has a surplus which does provide a reserve fund for possible growth. In addition following the recommendations in the last review, funding has now been augmented by grants from competitive proposals to agencies and clients.

The staffing and organizational structure appear adequate at this level of activity, but should be reviewed for possible adjustment if further growth were to be undertaken. The role of director, a full-time QSB faculty member, is significant in the Centre's operation and has a major impact on its direction as mentioned above.

## **Last Review Conclusions**

The 2003 Review Committee Report raised three matters to be addressed in the following five years: decision-making transparency, high quality research, and overhead distribution policy. It is the opinion of the committee that considerable progress has been made in the area of transparency of decision-making. This has occurred through the establishment of three Advisory Boards whereby faculty are directly involved in adjudication of proposals and grants, and feedback is provided to researchers. It has also occurred because of the operating style of the current Director.

With respect to the quality of research some progress has been made through the Fulbright Scholars program, the Visiting Scholars program and the Knowledge Exchange speakers. The internal refereed competition twice annually for grants has also assisted in improving research proposals. The recent success in receiving significant SSHRC grants will further stimulate this improvement. Success in having research published in top-tier journals remains to be realized. With respect to the issue raised in the last Review about the distribution of research overheads and potential pressure placed on the Centre, the Committee found that the Centre is complying with the University's policies on overhead distribution. No issues were raised by the University's Office of Research Services or Queen's School of Business administration.

## **Positive Comments Received or Gleaned**

It is important to stress that although there were some concerns expressed by stakeholders, there was in general strong support for the role, contribution and performance of the Centre. Of particular note are the following comments:

It is commendable to see that the Centre has expanded its stakeholder base and thus its audience. A focus on multidisciplinary research projects and alliances is definitely a move in the right direction. In particular there is a growing interest and awareness amongst graduate students within the School of Business, which has certainly been aided by the funding available through competitions.

The success in augmenting funding through external grants and contracts means that more research funds will be available for faculty and students. The reserve fund appears to be growing.

The Advisory Boards are now operating effectively and are making decision-making more transparent, which was an issue raised by the last review. Feedback on proposals submitted also has clarified expectations and standards.

The Conference activity, such as the Rural Vitality in Eastern Ontario held this past spring, has raised the visibility of the Centre in the community, opened up a new research theme, as well as engaged the public sector. These annual conferences are to be encouraged for all of these reasons.

The Fulbright Scholars program has brought fresh blood and stimulation to both faculty and graduate students. In turn these visitors have created a network for the School and the University. The Knowledge Exchange Seminars have created a venue for research themes to be explored and multidisciplinary opportunities developed.

Although awareness of the Centre is still an issue, the Centre's Newsletter and the Open House, are beginning to address it.

It is important to note that the support from the Dean has been a critical element in the success of the Centre and it is assumed that this support will continue in the future.

## **Issues Raised by Stakeholders**

During the Committee's deliberations and communications through the various sources mentioned earlier, a number of observations were made which should be considered if the Centre is to continue its activities. Some of them may well be based on perception and/or context, and should be evaluated carefully before making changes.

A perception exists that the direction of the themes of the Centre's research is MIS-focused rather than multidisciplinary. Certainly the background of the three directors is MIS and the roots of Knowledge Management are in the IT area. Yet this perception seems contradicted by the evidence. Only one of the seven major projects currently underway is MIS-focused. In

addition, the outreach to stakeholders in other disciplines, faculties and universities would suggest that the Centre is becoming multidisciplinary and international.

As of yet there is little evidence of publication of the Centre's research output in top-tier academic journals. This may partly be explained by the time required for basic research to be reviewed and accepted but also because Knowledge Management as an area is in its infancy. Nevertheless for a research centre this is a concern.

There exists a concern that the Centre has not yet established a high level of awareness in the academic community and that academics, especially those outside the School of Business, do not know what it does. The Committee believes that the best way to achieve such awareness is to focus on high quality research and output that establishes credibility. Many wonder what Knowledge Management is and as such what's so new. It is worth noting that the current director has launched an Open House at the beginning of each academic year as well as commissioned a student project to research the 'branding' of the Centre.

Concern was expressed that one of the major conferences promoted by the Centre in the past was by invitation only for international experts in Knowledge Management, and only two QSB faculty members were included. This again led to the perception that the Centre may cater to specific interests and is not significantly inclusive.

## **Future Directions**

The Committee met with the current Director of the Centre to raise some of the concerns outlined above and also to learn of future directions being considered.

In her presentation, the Director outlined the current research themes:

- Healthcare knowledge work and administration
- Knowledge-based regional economic development
- Knowledge-based private sector enterprise

These are broad themes, and could drive an expanded stakeholder outreach including both the private and the public sector. This could also require growth and perhaps an increase in staff. In the Director's assessment, the staff and organizational structure are adequate at this level but will have to be addressed if further growth is to take place.

The Director reaffirmed the basic mandate of research in the area of Knowledge Management and is aware of the tension between academic and clinical research and the need for top-tier publications. She also believes that the Centre should remain a School of Business-based centre while serving a multidisciplinary role. The Director is aware of the need to enhance the profile and visibility of the Centre, and outlined specific efforts she has taken and will continue in the future.



## **Recommendations**

The Committee unanimously recommends that

- the Monieson Centre be renewed for another five years;
- the Monieson Centre be encouraged to continue to increase the public perception and awareness of its role and purpose within QSB and the university as a whole;
- the Centre be encouraged to continue expanding the participation of faculty and graduate students across the Queen's campus and elsewhere, while remaining based in the School of Business;
- the current focus on research publishable in top-tier publications be a high priority while maintaining a balance between pure, applied and clinical research.

## **Current Director**

Although the mandate of the Review Committee is not to evaluate the performance of the Director, the Committee feels compelled to comment on her contribution to the Centre and its activities. It became very clear in our review of the documentation available, comments from the survey and letters received, experiences of committee members well acquainted with the Centre, and the interview with the Director that she has been a role model. Her energy, enthusiasm and conscientiousness have been truly remarkable. Queen's and the School of Business are very fortunate.

## **Appendix A – Source Documents**

### **Senate Review Committee Terms of Reference**

- Centre Review
- Flowchart

### **Monieson Centre (KBE) Constitution**

#### **Historical Highlights**

#### **Report from the Review Committee, 2003**

#### **Annual Reports**

- May 2004 – Dec. 2006
- Jan. 2007 – Dec. 2007

#### **Stakeholder Feedback**

- Campus-wide Advertisement
- School of Business email Survey
- Letters from Stakeholders
- Interviews with Stakeholders

**Appendix B – Point Form History of the KBE/Monieson Centre (appended)**

## THE MONIESON CENTRE HISTORICAL HIGHLIGHTS 1999-2008

- Established January 1999 as Queen's Centre for Knowledge-Based Enterprises with funding from Melvin R. Goodes (former Chairman and CEO of Warner-Lambert)
- 1999 – Jim McKeen appointed Director
- August 1999 - Doors opened in Mac-Corry B413
- November 1999 - Queen's KM Forum established
- 2000 – Speaker's Series established
- May 2000 – 1<sup>st</sup> Centre Newsletter published
- May 2000 – Ontario Research Development Challenge Fund (ORDCF) awarded to Centre
- October 2000 – Knowledge Summit 2000 – *Creating Wealth in the Knowledge Economy*
- 2001 – Knowledge Café established
- January 2001 – Queen's E-Commerce Research Program merged with Queen's Centre for Knowledge-Based Enterprises
- Winter 2001 – Annual Roundtables established – First annual *From .com to .profit*
- June 2001 – *The Alliance Edge* Partnership established
- June 2001 – Calls for Research – *Knowledge sharing culture within organizations*
- October 2001 – Knowledge Summit 2001 – *Innovation and Economic Growth: Canada faces the 21<sup>st</sup> Century*
- 2001-2003 – McKeen away on sabbatical and paternity leave. Brent Gallupe serves as Director
- 2002 – Call for Research – *Communities of professional practice in knowledge-intensive industries*
- Winter 2002 – 2<sup>nd</sup> Annual Roundtable – *Health Care & Knowledge Management: Building Bridges to Better Patient Care*
- Fall 2002 – New Research Cluster established – *International Knowledge Economics*
- October 2002 – Knowledge Summit 2002 – *Knowledge Leadership and Learning: Leveraging Canada's Knowledge Resources*
- October – Knowledge Management Doctoral Consortium 2002
- Winter 2003 – 3<sup>rd</sup> Annual Roundtable – *Customer Knowledge Management (CKM)*
- 2003 – Jim McKeen reappointed as Director
- Spring 2004 - Queen's Centre for Knowledge-Based Enterprises renamed The Monieson Centre
- May 2004 - Knowledge Roundtable – *E-learning from Practice to Profit*
- May 2004 - April 2006 – Research Project: Intel: *Enhancing Virtual Teams*
- November 2004 – Monieson Doctoral Consortium
- 2004 Fulbright Program established:
  - September 2004- May 2005 - Dr. Michael Zack of Northeastern University
  - January - June 2006 - Dr. M. Lynne Markus of Bentley College.
  - October 2007- June 2008 - Dr. J.C. Spender, Emeritus Professor
- April 2005 – Knowledge Roundtable – *Investing in Health Care*
- May 2005 – April 2006 – Research Project – BMO: *Knowledge Transfer*
- October 2005 – Monieson Doctoral Consortium
- 2006 – Knowledge Cafe rebranded as Knowledge Exchange
- June 2006 – Knowledge Summit – *Making Knowledge-Based Organizations a Reality*
- July 2006 – Present - Director Yolande Chan
- Fall 2006 – Strategic planning exercise conducted. Monieson Centre funding provided for QSB faculty and student research activities. Two new advisory boards created:
  - The Research Advisory Board to maintain the excellence of the Centre's research programs
  - The Research Competition Adjudication Board to assess the merit of QSB faculty and student funding applications

- November 2006 – Monieson Doctoral Consortium
- May 2007 – HR Conference – *Your Human Resources: What You Know; What You SHOULD Know*
- May 2007 Memorandum of Understanding between The Monieson Centre and the Prince Edward/Lennox & Addington Community Futures Development Corporation
- 2007 Research Projects –
  - *Building a Knowledge-Intense Nursing Workplace Using a Practice Scholarship Program* (launched winter 2007)
  - *Centre for Health Economics, Services, Policy and Ethics Research in Cancer Control* (Letter of Intent approved September 2007)
  - *Kingston Community Health Centres Project* (winter - fall 2007)
  - *Kingston Economic Development Corporation (KEDCO) “Creative Economy Challenges: Retention of Queen's Graduates in the Greater Kingston Area”* (launched December 2007)
  - *Prince Edward/Lennox Addington Community Futures Development Corporation (PELA CFDC)* research projects (launched summer 2007)
- 2008 Research Projects
  - *Amherst Island project “Towards a Common Community Vision: Case Study of Amherst Island”*
  - *Institute of Chartered Accountants of Ontario project “CA to CFO to CEO: Necessary Competencies”*
  - *SSHRC Community University Research Alliance project “Revitalizing Rural Economies through University Partnerships”* (Letter of intent approved, full proposal being developed)
  - *SSHRC International Opportunities Fund project “Understanding Institutional Influences on Cancer Care Accessibility, Quality and Innovativeness: Lessons from Canada and the UK”*
  - *SSHRC Knowledge Impact in Society project “Queen’s University/Eastern Ontario CFDC Partnership to Address Rural Economic Development Knowledge Needs”*
- February 2008 Memorandum of Understanding between The Monieson Centre and ‘Knowledge Mobilization Works’ operating under Peter Levesque
- May 2008 – Annual Conference – *Rural Vitality – From Surviving to Thriving – An Eastern Ontario Perspective*

#### **Of Note since the 2003 Five Year Review**

- Annually QSB undergraduate and graduate students have received D.D. Monieson Fellowships or Scholarships ranging in amounts from \$1,700 to \$5,000.
- Journal articles, conference presentations, working papers, and theses supported by The Monieson Centre have increased yearly with a total of 36 since 2004.
- There have been 40 Knowledge Café/Exchange sessions with a total of 50 speakers.

**Appendix C – 2007 Annual Report (appended)**

# **The Monieson Centre Queen's School of Business**



**Annual Report:  
January 2007 — December 2007**



## The Monieson Centre, Queen's School of Business Annual Report: January 2007 — December 2007

### Executive Summary

#### Scope

This report covers the activities of The Monieson Centre in 2007. During this year, the Centre continued to increase its focus on research and under the leadership of the Director, Dr. Yolande Chan, brought together individual researchers and research teams, both at and beyond Queen's, to examine complex organizational issues arising in the knowledge economy.

The research emphases included knowledge-based regional economic development and knowledge management in health care. Large research projects involving industry and government were developed in partnership with researchers from Queen's and other national and international institutions, as well as community leaders. The Monieson Centre took the lead on three Social Sciences and Humanities Research Council (SSHRC) proposals totalling \$1.3 million, and was actively involved in four other multi-year project proposals that total \$11.2 million. Currently, the Centre is in discussion with the Institute of Chartered Accountants of Ontario regarding a research project that will assist its members in career development. Current projects are detailed up until December 31, 2007, and future initiatives are noted.

#### Conferences and Events

The Monieson Centre uses various means to deliver innovative insight into important matters of knowledge management, including its series of conferences, lectures, and seminars. These events encourage dialogue among faculty, students, and practitioners. In 2007, the Centre hosted a major conference on Human Resources, bringing together over 40 experts and practitioners to examine best practice success stories, leading edge research, and breakthrough solutions to deal with current work force challenges.

The Centre's Knowledge Exchange series continues to be immensely popular among university faculty, students, staff, and external leaders. The sessions are interactive and the topics diverse. In addition to disciplines within the School of Business, speakers and participants come from a wide variety of academic disciplines such as Education and Geography. Industry and government experts add welcome insight from the podium and during the discussion. There were 13 Knowledge Exchange seminars in 2007.

#### Visiting Scholars

The 2007-2008 Fulbright Chair is Dr. JC Spender. This Research Chair is sponsored by The Monieson Centre to conduct research on Knowledge Management and work with faculty and students on studies of mutual interest. Dr. Spender delivered the Fulbright Lecture - "**Leadership: Knowledge Management by a New Name?**" to a receptive audience in October 2007, and continues to participate actively in Monieson conferences, events, and research at Queen's. In addition to hosting the Fulbright Chair, the Centre hosted visiting scholars,