# IBP Knowledge Gateway -
# How to Guide: Organize and manage a
# virtual online discussion forum

## 1    Introduction

Virtual online discussion forums are specific time-bound events that allow professionals from different parts of the world to come together virtually to raise questions, discuss timely and important issues, share experiences, and work together to develop new knowledge, ideas and approaches. It reaches beyond a real time meeting. It gives a voice to the individual so that they can share their knowledge, experience and opinions and possibly contribute to the dialogue on technical, policy and practice issues.

Organizing an online forum is a challenging and rewarding experience. Once you have identified your audience (their needs, interests and constraints) and thought through the objectives of your forum, good and careful planning will ensure that the interaction is lively, engaging, purpose-driven, and attracts a diverse range of people and perspectives.

This paper will provide guidance on how to set up a knowledge network to support a global discussion forum and discuss how to grow, maintain and sustain this virtual community after the initial discussion forum. It has been developed based on lessons learnt by the Department of Reproductive Health and Research (WHO/RHR) and Knowledge for Health (K4H) Project (and its predecessor project, INFO) of Johns Hopkins Bloomberg School of Public Health, Center of Communication Program (JHU/CCP). The example used is based on the preparation undertaken by WHO/RHR and the Department of Human Resources for Health (WHO/HRH) to launch the Health Professional Global Network (www.HPGN.org).

## 2    Facilitation

All large global knowledge networks have a facilitator that manages the community. When not involved in a discussion forum a facilitator:

- accepts all new members

- helps with any technical issues or challenges members may have

- sends out periodically announcement of events or short lists of interesting resource materials

- responds to individual queries

- responds to spontaneous discussions that might emerge in the community

- helps to organize the next big virtual event.

This requires 5%-10% of a person's time when the network is not involved in a discussion forum. During a discussion forum the input from a facilitator is more demanding and intensive.

Most discussion forums and large virtual knowledge networks are facilitated for their duration. A facilitator reviews and accepts all contributions. If the contribution is not acceptable, for example it is advertising an individual or product then the facilitator writes

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back to the originator explaining why their contribution it is not acceptable and will not be sent out to the community. The contributor can be given the opportunity to modify it. .

If the community receives only one or two acceptable contributions they can be automatically are sent to the community. But if you are involved in a discussion forum you can receive anything from 10 to 100 contributions each day. You do not want to send out a 100 emails, so to stop this from happening the system can be set so that it will not automatically send out the contributions received. The facilitator acknowledges each contribution and then summarizes the contributions received into a daily digest. On principle the community should only receive the maximum of 2 emails per day.

The role of the facilitator has been defined in detail in Annex 1.

## 3 Issues to think about before setting up a knowledge network

It should be noted that a virtual discussion forum creates a knowledge network and the individuals organizing this network need to consider the following issues:

1. What is the purpose of this knowledge network?

2. What are the objectives?

3. How will the information generated and knowledge shared during this discussion forum will be used?

4. How long will the network last - just for the duration of the discussion forum or are you creating and organic process in which this community will become a growing entity engaged in periodic and ongoing dialogue, based on your needs and the interest and information needs of the community?

## 4    Checklist

1. Start with a realistic timeline.

2. Establish a small planning committee or advisory group.

3. In collaboration with the committee or group develop a theme for the forum and agree key issues to be discussed in the forum.

4. In collaboration with the committee plan a timetable for the expert/guest speakers input and identifies the experts/guest speakers.

5. Team leader contacts each expert/guest speaker to discuss how a virtual global discussion forum is set up, their role and input into the forum.

6. Prepare promotional materials, flyer, announcement and invitation. Finalize in collaboration with your committee

7. Identify facilitators and train facilitators, if necessary.

8. Develop guidelines or ground rules for the management of the forum.

9. Prepare forum support materials and identify resource materials.

10. With members of the committee map networks and develop a diverse marketing campaign.

11. Outline roles and steps necessary for the day-to-day technical operation of the forum.

12. Prepare an end of discussion forum evaluation survey

13. Build in a feedback loop.

14. Discuss and plan what happens

## 5    Example of how to set up and manage a global knowledge network and virtual discussion forum

The following is an outline of the process that was used to establish and launch Health Professional Global Network (HPGN.org). The discussion forum was used to start building this network, which will be an ongoing and growing knowledge network. This community now has over 2,700 members from 134 countries and grows daily.

This network was set up as one of the outcome of a global consultation on the "Contribution of Health Professions to Primary Health Care and the Global Health Agenda", Geneva, June 2009. 59 leaders of different health professions attended this meeting and agreed to engage their membership in an ongoing dialogue focused on policy and practice issues around the themes of interprofessional collaboration and education and how to collaborate and contribute to improving global health issues. The HPGN has a steering committee of 14 members who either lead a professional association or research institute.

## 5.1     Start with a realistic timeline

- Build in adequate time for preparing the forum.

- Build in adequate time for promotion. This will ensure that enough people are involved and prepared to participate in the discussion. Allow three to four weeks for promotional activities.

- Include enough time to register/enroll and inform participants about how to participate. This can take up to a week or more, depending on the numbers.

- Incorporate a review process for the content posted through the forum, if this is an important issue for the organizing committee.

- Consider time for training facilitators and experts/guest speakers in advance.

- Include a wrap-up and evaluation at the end of the discussion. It is important to do this while participants are still energized and the experience is fresh in their minds.

- Plan next steps.

## 5.2     Define the purpose and scope of the knowledge network and discussion forum.

Every discussion forum needs to be established with a vision of what you want to achieve.

What is the purpose? What are your objectives? Who do you want to involve? Why?

This will help to initiate the formulation of a very short concept paper.

For example purpose of the HPGN.org:

- The outcome of this discussion forum will contribute to policy and practice dialogue with the executive leadership of the Health Professional Global Network (HPGN) on supporting interprofessional education and practice.

- This forum was held in February 2010 and involved over a 100 participants. It was followed up by a video conference involving approximately 100 senior members of health professional associations and faculties from 6 country sites (with four additional representatives joining by telephone) to discuss the outcome and conclusions of the discussion forum and agree the next steps.

## 5.3     Steering committee/advisory group

Not every discussion forum needs a steering committee/advisory group. If however you want to reach a large diverse audience of individuals and plan a large global online discussion forum then it is advisable to have such a group. The group can be composed of representatives from different departments, international agencies, collaborating centres, institutes, professional organizations. They should have an interest and possibly programmes in the technical issues under discussion. Ultimately, you decide who could help and would be willing to help set up a global discussion forum.

Map out what it is you are asking people to do and invite people to join the group.

- reach consensus on the purpose and objectives network and assist with defining the theme for the global discussion forum, key issues and discussion threads

- assist in the revision and finalization of the background paper, promotional flyer, email announcement and invitation

- identify expert/guest speakers

- set the dates for the discussion forum

- map and provide resource materials

- map networks and help to advertise the discussion forum

- support the discussion forum, as an expert/guest speaker

- decide and plan how to launch the discussion forum

- support the follow-up and next steps

- review the evaluation framework

As it is difficult to schedule regular planning meetings via a conference call or GoToMeeting with a group from diverse locations it is suggested that an initial date and time is set in collaboration with all parties. Use a simple tool like **Doodle.com** to schedule the date and time. This is a simple free virtual scheduling tool. The organizer of the call puts down the possible dates and times for the call and sends the Doodle to everyone. The Doodle allows people to put down their availability, collates all responses and sends back one collated response by email to the originator. Simple to use and saves the endless emails that flow when one is trying to schedule an event between a group of people.

Schedule the call for the date on which the majority of the group can meet and ensure meeting notes are written up and circulated to all parties after the call. On the first call just agree a date and time when follow-up calls will be made. Those that can make the call will join it. Those that can't will receive an email summarizing the planning discussion and can respond to this. How many conference planning calls will be needed depends on your time frame and engagement of the group. On average 3 - 4 four calls are needed to plan a large global forum. Most of the work is done by email. All materials are prepared and sent out to the group to comment on.

Prepare an agenda for each meeting. Make a list of the activities you will require the steering group/advisory group will be asked to participate in. People committing to activities need to be clear about what they are committing to, the amount of time it will involve and the length of time. No activity should require an intensive time input, except when acting as a guest speaker/expert for a day.

### 5.4    Develop a theme for the forum and outline for each week's discussion.

Start with an overall theme for the entire forum. Then develop an outline for the content for each week's discussion. Include a list of relevant resource materials and readings. Knowing the topics to be discussed each week will help participants prepare for and engage in the forum consistently and appropriately. Discuss, review, revise and agree the themes and discussion threads with the steering committee/advisory body and start identifying useful reading and resource materials. Split the themes and discussion threads over the duration of the discussion forum.

***Theme: Interprofessional collaboration in education and practice for Primary Health Care:***

- Is it a reality - What is the value added and what is your experience?

- What do we have in common and how can we use it to improve global health?

***Topics for discussion - please note that each discussion thread builds on the previous discussion thread.***

***Week 1: Why do we need interprofessional collaboration and education (IPC/E)?***

- Does it happen? In which areas is it most needed?

- Share an experience - How does IPC/E make a difference in your work.

- When does IPC/E work best - what are the challenges and how can they be overcome

- What are the key elements of a successful interprofessional educational programme?

- What are the challenges and how in your experience can they be dealt with?

- In your experience in education - what elements/components help build capacity for collaboration?

***Week 2: Do you think that IPC/E can enhance the implementation of primary health care programmes?***

- How can IPC/E contribute to patient centered care?

- Share your experience on what steps are needed to improve IPC/E at the primary health care level?

- Respond to comments

- How best to foster commitment to IPC/E, share the Ontario Blueprint

- Respond to comments

- Where do we go next? What practical collaborative activities can you suggest

***Week 3: Conclusions, evaluation and next steps***

## 5.5 Identify and train experts/guest speakers and facilitators

**Experts/guest speakers:** Subject matter experts add credibility to your discussion and generate interest in participating. Brainstorm a list of possible experts and assign members of the steering committee/advisory group to contact them. The role of the expert/guest speaker is detailed in Annex 1.

In summary an expert/guest speaker will iintroduce the discussion thread by preparing 1–2 paragraphs raising key issues and questions to stimulate the debate. This can prove challenging as it should written using English as a second language and in a chatty style. The expert/guest speakers will also provide resource materials and respond to the comments received.

The expert/guest speaker is in constant touch by email with the facilitator who will guide and assist them in their assignment. The expert will send their bio, paper and resource materials to the facilitator. The facilitator introduces the expert/guest speaker and sends out the materials. The facilitator collates the comments received and send this daily digest to the expert/guest speaker. The expert/guest speaker prepares the response, which should respond to issues and raise questions to stimulate the debate. This is then sent back to

facilitator. The expert will need to put to one side between 2 - 4 hours to respond to the daily dialogue. On average one expert/guest speaker is required every one to two days of a discussion forum. The larger the forum the more experts/guest speakers that will be required, unless a core group has dedicated time to respond to the issues raised by members.

**Facilitator:** A skilled facilitator can keep the discussion focused on the topic and moving at an appropriate pace with higher levels of participation. The facilitator should plan to spend at least half to a full day of each work day during the forum assembling the discussion postings into a daily digest (if they are to be digested into a single, daily email), working with each expert/guest speaker, planning questions, acknowledging contributions, helping members with any problems, acknowledging contributions, summarizing contributions, sending out resource materials and sending out expert/guest speaker comments and questions.

**Training:** Facilitators and experts/guest speakers may need training in how to use the system, guidance on how to manage and respond to a community and individuals in different circumstances and how to link with additional resources. A little bit of training will ensure that their experiences are rewarding and that their contributions are meaningful.

## 5.6    Develop guidelines or ground rules for your online forum.

These guidelines outline how your discussion will operate. While it is tempting to develop guidelines as you go along, it is not efficient. Getting this down in writing in advance as it helps you see the bigger picture and ensures that the process moves along smoothly.

In this part of your planning, you should think about:

- **Registration**. What registration options will be most appropriate for your audience? Online? Email? Both? Which option best suits their needs?

- **Extra help**. Will you translate messages for people who write in languages other than English? Do you additional assistance to respond to technical issues or problems?

- **Evaluation**. How you will conduct your evaluation and share the results with participants?

- **Reminders**. Will you send out reminder emails during the forum to explain how to post a message, get help, or retrieve readings from the online library?

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- **Facilitator**. Will your forum be facilitated? Briefly define the role of the facilitator to the forum members. If you have more than a few participants, you will probably want a moderated forum to screen out inappropriate contributions or errors and support participants and experts/guest speakers. Decide what kinds of postings will be approved immediately, rejected or conditionally approved? Decide if you will send out the postings individually, as they are approved, or if they will be combined into a single daily digest each day?

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**Subject: HPGN:  How to Participate**

You can participate in the discussion in one of two ways:

1. By e-mail:  You will receive one e-mail each day. It will contain all the discussion items or e-mails received for the forum each day.  To participate in the discussion, just click "REPLY" in your e-mail program.  Your message will be included in the daily e-mail the next day and you will receive a confirmation e-mail from us to let you know that we received your comment.  Be sure to include your name, organizational affiliation and country.

2. Online: To participate online, you must log in to the Health Professional Global Network virtual community held on the IBP Knowledge Gateway.  To log in, click on this link and then enter your username and password, click on remember me and enter: http://hpgn.org.

As a member click on the link to enter http://hpgn.org/Community.aspx?c=ae591e93-ab1b-4263-8493-0b3dd95b6401  - browse contributions, review resource materials in the library and

click on **DISCUSSIONS**. to respond or comment. Or click on a discussion item, click on **RESPOND** and follow the online directions. Discussions are the archived online version of e-mails.

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## 5.7    Map networks and develop a diverse marketing campaign.

Engage your colleagues and associates in creating an exhaustive list of prospective participants. Ask them map their networks, list serves and internal and external colleagues, collaborating partners etc. As interesting as your topic will be, everyone who will be invited will not participate. A global discussion forum will involve at least several hundred to a thousand participants. From experience for each five participants, only one will probably post a message during the forum. The others will read postings and forward the postings and resources to their colleagues.

Take advantage of other electronic forums and newsletters to promote the forum.

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### 5.8 Prepare promotional and forum support materials.

When there is a good plan on the content and process for the discussion forum then it is time to draft promotional and support materials, such as a flyer advertising the forum, an email announcement and email invitation.

Some partnerships, such as the HPVaccineNet.org wanted to develop their own website and registration page, see. http://hpv-vaccines.net/

If you want a similar website then this can be arranged. The originators of the Knowledge Gateway have their own registration page for the reproductive health community: http://my.ibpinitiative.org/

If you are developing your own global network it is possible to develop a similar page for your network. Start to prepare the virtual community with core resource materials.

***Invitation and announcement***

Your invitation and announcement be well constructed emails. They should present a short, concise, but convincing case for why prospective participants should join this activity. It should answer the question "what's in it for me?" in the first sentence or two.

Include the following:

- The scope of the discussion

- The time period

- The host or sponsor

- The purpose

- If the discussion will run over a long period of time, include a timeline that explains what topics will be covered during which time period. Make it similar to a syllabus that a professor or teacher hands out at the start of a class.

- How to register, giving people the various registration options (email, online, how to make anonymous postings, etc.)

Send out the announcement about two weeks before the discussion forum begins so that people can join the community and save the dates. Send the invitation once or twice the week before the discussion forum starts.

Throughout this time people will start joining the community. The facilitator will respond to each request and at periodic intervals send out short notices to the community updating them on the growing membership, repeating the date the forum will start, requesting the membership to circulate the invitation to their networks and colleagues and possibly sending out links to interesting resource materials that will be useful in the discussion.

***Reminders***

Reminders are helpful fillers when there are lulls in the discussion, when active participation seems to be limited to just a few participants, or when a new topic is being introduced. Sometimes, reminders simply reiterate the information that was outlined in the welcome letter. For example, the excerpt below is a reminder on how to participate.

## 5.9 Outline the roles and steps necessary for the day-to-day technical operation of the forum.

This will come in handy when there are staffing changes, reassignments and emergencies that have the potential to interrupt the regular operation of the seminar or discussion.

Ensure that all parties are aware of the governance and copy right statements on the Knowledge Gateway. Develop guidelines for what kind of postings you will approve, reject or ask for additional information. For example:

Decide how to launch the forum. This can be through a video conference or a well known guest speaker providing a short catalytic paper to stimulate the debate.

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**Do not approve:**

- Postings with single phrases or sentences like "Thank you" or "I agree completely." Write back to the person and ask them to give more information about why they agree or how this material will be useful in their work. Ask for examples based on their own experience.
- Postings that violate the rules of the forum – the person does not identify him or herself; they are insulting, they ask for money or try to promote ta product, or their comment is completely irrelevant to the discussion.

**Approve with a comment:**

- Postings that are off the topic, but relevant to discussion. Explain politely that the topic will be covered during a different week of the discussion.

**Forward to expert/guest speaker:**

- Acknowledge all contributions and summarize in a daily dialogue
- If a posting seems inaccurate, acknowledge it and either request further clarification from the author or collate separately. Send with a short note to the expert/guest speaker that the comment may be inaccurate - do they have anything to say about it.
- Acknowledge postings that are the opinion of the person, but are being presented as fact and go back to the individual and ask for further clarification.

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### 5.10. Build in a feedback loop.

At the end of the discussion forum send out an evaluation survey to gather feedback from participants – especially from those who may not have actually contributed to the discussion itself. On average about 10%-15% of community members will respond to a survey. A survey does give some useful feedback about the discussion forum.

Below are examples of the kinds of questions you can ask.

1. In which country do you work?

2. Please describe the type of organization in which you work.

3. Please rate your satisfaction with the content of the discussion about pregnancy prevention:

__ I was very satisfied with the content of the discussion

__ I was somewhat satisfied with the content of the discussion

__ I was not satisfied with the content of the discussion

4. Please rate your satisfaction with the amount of discussion:

__ There was the right amount of discussion

__ There was too much discussion

__ There was not enough discussion

5. To what extent do you feel that the forum met its goal of generating meaningful, relevant, and timely conversation about effective practices in adolescent reproductive health?

__ The Forum definitely met this goal

__ The Forum somewhat met this goal

__ The Forum did not meet this goal

6. Have you used any resources or practices discussed in the forum in your work?

__ Yes          __ No          __ Not yet, but I plan to

7. Did you post any messages on the forum?

__ Yes          __ No

8. If so, did you participate in the forum primarily by:

__ Email          __ Online          __ Combination of both

9. If you participated online, did you have problems logging on to the system?

__ Yes __ No

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10. Did you download or read any of the materials recommended during the forum?

__ Yes          __ No          __ Not yet, but I plan to

11. Did you think involving a guest panelist in the discussion each week was…?

__ Useful              __ Not Useful              __ No opinion

12. Did you forward any of the forum postings to other people? __ Yes __ No

13. Did you like receiving a single, digested email each day or would you have preferred to receive the emails as they were posted?

__ Liked the single digest

__ Would have preferred to receive the emails as they are posted

## 5.11  Analyse your feedback and summarize the discussion forum

Analyse the survey and prepare a summary of the key issues, outcomes and experiences shared. Feed back this analysis to the community - review how to access the daily digest and discuss next steps.

## 5.12  Decide on next steps

In collaboration with your partners decide on how to maintain and grow the community. It is not necessary to keep the community constantly active. Every week send out a few resource materials and be responsive to individual requests or spontaneous discussions that might emerge periodically from the users. Every three to four months a discussion forum can be held in response to the information needs and issues emerging from the community. Topic specific subcommunities to meet the specific issues raised by the community can be supported by individual partners. One way of keeping a community alive is to share the task of maintaining it over time with the partners supporting the steering community/advisory body.