Knowledge Networks and Virtual Collaboration: A Framework for Success

By Erica Nelson

2 December 2009

CONTENTS

Acknowledgements

Part 1: An Introduction to Knowledge Networks

Introduction………………………………………………………………………………………

Introduction

Have you ever wanted to network and communicate with geographically distant colleagues? Have you ever needed to work together with partners to produce policy or program documents? Have you ever looked for an easy way to keep field staff up-to-date on headquarters activities and announcements? Have you wanted to give participants in regional or country-level meetings the opportunity for a follow-up online discussion forum? Have you ever wondered what type of web-based tools and practices are available that could help you in your work?

For those of us working in global public health, there is no shortage of email list-serves, research articles, conferences, websites, newsletters and publications competing for our daily attention. Yet, precisely when we seek immediate answers to urgent questions or expert guidance, it can be difficult to find what we are looking for. For those of us who live in countries with limited Internet services, we face more substantial barriers to accessing the information we need to do our work.

In order to address these gaps in knowledge and information transfer within the WHO, this guide provides recommendations and lessons learned so that you can create, manage, and evaluate a knowledge network. In this instance, a "knowledge network" is defined as a group of people who collaborate, interact and share work-related experience, expertise, know-how, contextual information and resources to get a job done.[1] In practice, knowledge networks can encompass a range of activities, from a time-bound virtual working group organized to undertake a specific assignment such as reviewing a document or planning a meeting, to a global online discussion forum, to virtual support and follow-up to meetings and conferences.

What we offer here are the first steps to get started as a facilitator of a knowledge network. With that said, the skills necessary to effectively facilitate the exchange of expertise and experience among your colleagues will take time to develop. The tools presented in this guide are crucial components in the transfer and application of knowledge but they are no substitute for the professional relationships that these communities rely upon. Included here are recommendations relating to all three components of a successful knowledge sharing strategy: people, process and technology.

---

[1] Definition adopted from Lou Compernolle and Sarah Pouezevara, *A practical guide for managers, facilitators, and users of (online) collaboration tools in the World Health Organization*, May 2008. Knowledge Networks are made up of Communities of Practice, defined by leading knowledge management theorist Etienne Wenger as "groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly." http://www.ewenger.com/theory/index.htm

This guide is divided into four sections: 1. An Introduction to Knowledge Networks; 2. Creating Knowledge Networks; 3. Managing Knowledge Networks; and finally, 4. Monitoring and Evaluating Knowledge Networks. Each section contains recommended strategies, tools and resources, as well as relevant WHO case studies and lessons learned. Once you have read this guide, you should understand the necessary steps required to:

➢ Network and communicate with other professionals in your field and the global public health community

➢ Exchange resource materials, tools and effective practices with colleagues both within and beyond the WHO

➢ Create virtual spaces where colleagues can contribute their voices and opinions to dialogue on policy and practice

➢ Enable colleagues to share problems and challenges

➢ Conduct online discussion forums

➢ Include colleagues who are not connected to online communities, e-learning groups, or virtual workspaces.

This guide has been co-produced by the Knowledge Management and Sharing (KMS) and Reproductive Health and Research (RHR) departments of the WHO. Thank you to everyone who contributed experiences and lessons learned to the making of this guide.

1. First Steps

Collaborative work and networks of expertise - known as "project teams," "professional societies" "guilds" or "working groups" - have long helped health practitioners to push their respective fields forward. In the past few years, however, the development of a wide range of communication technologies has given us new ways to reach across geographic, language and organizational barriers. This rapid growth of communication technologies has resulted in the common misperception that the tools themselves enable knowledge sharing, rather than the individuals and communities using them.

This guide will provide you with concise recommendations and strategies to help you create, facilitate, manage and evaluate knowledge networks. This is not a technical training guide. The Information Worker Applications (IWA) team, which forms part of the Information Technology and Telecommunications (ITT) Department, provides comprehensive training and support on a number of the tools discussed in this guide. We strongly recommend you contact them directly for technical training and demonstrations if any of these tools are new to you. What this guide offers instead are lessons taken from successful knowledge networks within the WHO, as well as recommended steps, timelines and templates.

Identify knowledge network objectives. It is important to define from the very beginning what concrete outputs your knowledge network will produce and the objectives the knowledge network will achieve. If you are hosting a discussion forum, for example, will there be daily or weekly summaries published online that participants can read and that can be archived for future use? If you are hosting a videoconference, is there a set goal for what will be achieved by the end of the session and a written outcome that can be circulated to participants? If you are using SharePoint for the benefit of an ongoing working group, is it possible to set time-specific goals so that you can mark your progress? It is important to let participants know the proposed objectives and outputs when they are first invited to join the knowledge network.

Avoid the duplication of effort. Will you be creating a knowledge network that duplicates the efforts of an already-existing knowledge network? It is important to first determine whether or not your proposed network will fill a knowledge gap. If there is an existing knowledge network you might consider a collaborative effort, instead of starting a new network from scratch.

Identify the added value for knowledge network participation. Knowledge Networks function when members gain value from participating. This might mean that members gain access to new professional contacts, access to key documents, access to expertise relevant to their work, or the opportunity to contribute to policy and practice dialogue.

Establish a timeline for the set-up and launch of your knowledge network
The key to a successful knowledge network is having a plan and a timeline in place well before invitations go out to prospective network members. We recommend establishing a steering committee to oversee the development of your timeline and planned activities.

Choose tools that fit your objectives. It is important that you let the answers to these questions guide your choice of tools rather than the tools dictating what kind of knowledge network you will create. If, for instance, the primary objective is to edit and publish a policy document in coordination with colleagues located outside of headquarters, then a videoconference session or online discussion forum may be unnecessary. If you want to keep some documents accessible to a select group of individuals by login only, and other documents available to a larger group, you may choose one online platform over another. If you need to organize a quick online meeting with little setup time, then a simpler application will work better than something requiring complicated login procedures. In the next section we will discuss the available tools in detail, but the point here is to think first about what job your knowledge network needs to get done before thinking about the tools you might use.

2. Collaborative Tools

It is very important that you choose a tool that suits your knowledge network's profile and objectives. It is very easy to scare off potential members with unnecessarily complicated technology. In order to decide which tool or set of tools is right for you, we recommend first answering the following questions:

> **What is the purpose of this community?** For example: Is it to exchange or edit documents? Is it to discuss or reach consensus on key issues with colleagues both in and beyond the WHO? Is it to keep members up-to-date on events and announcements?

> **Who is your audience?** For example: Are they all located in places with easy-to-access, high speed Internet? Do they have IT support where they work? Do they speak multiple languages?

> **What features will your tool need to have?** For example: Does the site need to be locked off from public view? Do you require audio or video to communicate, in addition to web content?

> **Will your knowledge network be moderated?** For example: Do you need content to be screened before going public or do you want members to be able to contribute content freely?

➤ **What kind of technical support will you need?** For example: do you need a tool that is supported by the IWA team so that you can receive training and technical help when required?

Once you have answered these questions you are ready to consider which tools will work best for your knowledge network.

2.1 Virtual workspaces, communities and discussion tools

Knowledge Gateway (EZcollab) is low-bandwidth, electronic communication tool that uses adaptive web-based technology to support knowledge networks and Communities of Practice linked to virtual workspaces. In 2006, the Knowledge Gateway was selected as a corporate collaboration tool for the WHO under the branding "EZcollab". It can be accessed via email or the web. It offers a space where virtual communities can host online discussion forums, house shared content libraries, edit shared documents, post announcements and calendar updates. It is a simple-to-use and does not require excessive administrative input. It can be used both with WHO and non-WHO colleagues.

Knowledge Gateway/EZcollab

Pros: Ideal for collaborations that involve countries with limited Internet access. Requires minimal training. Easy login procedure. Allows for customized branding of knowledge network site.

Cons: Limited options to customize. Less visually appealing to audiences accustomed to high-bandwidth graphic design.

WHO Example:
The Global Alliance of Nurses and Midwives (GANM) launched a knowledge gateway site in September of 2006 http://my.ibpinitiative.org/public/Default.aspx?c=1325c561-2b21-449e-880e-6623a1214707
This site has since been used to host global discussion forums on Nurses in Mental Health and the Health worker Migration Policy Initiative. The GANM knowledge gateway site hosts multiple topic-specific sub-communities, including a Spanish-language GANM group.

IWA training link: http://gva1swdiana.who.int/trainingforceuser/lpCourseOutline.aspx?id=510&ik=4F24D4D4D4E4E4D5399514D994E994E4F5054561D

SharePoint is a high-bandwidth, online collaborative platform that can be accessed via the web. It contains applications for content storage, editing and sharing, announcements, shared calendars and discussion forums (via wikis and blogs). Unlike EZcollab, it has advanced security features and authentication requirements. To become a SharePoint administrator you must first receive IWA training. SharePoint is particularly suited to small group collaborations in high-speed Internet settings. It can be used with both WHO and non-WHO colleagues.

SharePoint

Pros: Extremely flexible and highly customizable online workspace. Good for small-group collaborations. Works best in high-speed Internet settings.

Cons: Can be difficult for users with limited information technology skills. Takes more time to set up as members must be authenticated users. IWA training is required to be a SharePoint administrator.

WHO example:
Scientist Angelika Mara Tritscher, Food Safety, Zoonoses and Foodborne Diseases (FOS), used SharePoint to organize a large meeting in February 2009 on chemical contaminants in food. In order to prepare working papers for the conference, FOS together with the FAO set up a SharePoint site to share drafts and co-edit confidential documents. This knowledge network now contains 40 members.

IWA training link:
http://gva1swdiana.who.int/trainingforceuser/lpCourseOutline.aspx?id=632&ik=4F24D4D4D4E4E4D5399514D994E994E4F5054561D

2.2 Online meeting, seminar and videoconference tools

GoToMeeting is an online meeting tool. It is an easy and cost-effective way to organize and attend online meetings. GoToMeeting allows you to share slides, graphs, documents and any other applications on your computer with WHO colleagues and external partners in real time while talking on a conference call simultaneously. Participants can also share applications from their computer with the rest of the meeting attendees at the click of a button. You can invite up to 25 attendees to a GoToMeeting. If you are hosting a GoToMeeting, you must first download and set up this tool on your computer (demonstrations and training provided by the IWA).

> **GoToMeeting**
>
> Pros: Voice over IP technology for integrated audio/computer screen presentations. It is easy to setup and to use. Minimal training required.
>
> Cons: Audio quality not always consistent. Not for use with groups of more than 25 people.
>
> WHO example:
> Health Promotion Coordinator Dr. Gauden Galea used GoToMeeting to coordinate the 7th conference on Global Health Promotion in 2009. The combination of GoToMeetings and DropBox (an open-source web tool for document storage and sharing) allowed each of the WHO regional offices and HQ to co-edit conference documents and discuss changes to the conference program.
>
> IWA information link:
> http://intranet.who.int/homes/iwa/applications/gotomeeting/

GoToWebinar provides users with a virtual seminar space and is available to anyone with Internet access. GoToWebinar is similar to GoToMeeting, but is designed for use with up to 1000 attendees. The webinar can be either a one-way presentation of materials, or you can use it to invite discussion from the audience. In some cases, the presenter may speak over a standard telephone line, pointing out information being presented on screen and the audience can respond over their own telephones, or they can send questions via email. With GoToWebinar it is possible to record the proceedings for later study. Like GoToMeeting you must first download and set up this tool on your computer. It takes slightly longer to set up than GoToMeeting and is better suited to meetings or seminars that require advanced preparation.

GoToWebinar

Pros: Provides templates for email invites, confirmations and reminders. Contains polling and survey applications. Allows for practice sessions in advance of live webinar. Can record proceedings for later use. Most suited to online seminars requiring advance preparation.

Cons: GoToWebinar takes longer to set up than GoToMeeting so it is not ideal for spontaneous online collaboration.

WHO example: WHP Coordinator Hooman Momen uses GoToWebinar for the monthly Global Health History Seminar series. Most recently, in December 2009, the WHP co-organized a Webinar on "Essential and inessential medicines-the changing role of pharmaceuticals in world health"

IWA information link:
http://intranet.who.int/homes/iwa/applications/gotowebinar/

WHO videoconferencing (VC) service is available to all WHO staff. It can connect up to 12 sites through video, as well as connecting to additional participants through audio-only. If you want to show participants PowerPoint slides, websites or other multimedia resources, it is possible to alternate video and computer monitor displays. There is a cost to the user if the WHO initiates the videoconference and brings in participants from outside of the organization.

WHO VC service

Pros: Allows for real-time, virtual face-to-face communication between geographically distant colleagues.

Cons: More costly than using GoToMeeting or GoToWebinar. Requires advanced planning and testing of all site connections.

WHO example: Scientist Margaret Usher-Patel, Reproductive Health and Research, used the WHO VC service to set up the "Reproductive Health (RH) in the New Aid Architecture" 29 October 2008. This videoconference linked 6 countries (Belgium, Ethiopia, Switzerland, Thailand, Uganda and the United Kingdom) to further discussion on RH funding following 3 global discussion forums.

WHO intranet link:
http://intranet.who.int/homes/gts/faqs/

2.3 Non-IWA supported tools

Elluminate is an e-learning tool that encompasses web conferencing, teleconferencing, videoconferencing and social networking products and services. The tool was developed by education specialists and is particularly suited to virtual learning. To use Elluminate, you must contact the PAHO regional office, as they maintain a subscription to this service.
Link: www.elluminate.com

Skype is a free software package that allows for voice and video-conferencing between two computers, as well as conference calls without video between multiple computers. All users must download and configure the software on their computer before use. There are fee-based services that allow you to make computer-to-landline phone calls at cost.
Link: www.skype.com

Blogspot is a free software package that allows you to create a blog accessible to the general public. You can share your thoughts, videos, photographs, and documents. It is easy to set up and requires no additional training.
Link: www.blogspot.com

Wiki is a type of software that allows users to freely create and edit web page content using any web browser. Wikis are simple to use and require no additional training. There are both open-source and commercially available versions of wiki software if you want to create a wiki that can be accessed by individuals outside of the WHO. For wikis that involve WHO colleagues only, the WHO intranet contains wiki functionality.

Wikis

Pros: Easy to setup and use. Provides simple templates for the collaborative creation and editing of web pages. Good for when users need to continuously edit and change web content.

Cons: When copying content from documents, the formatting can be difficult to manage. Some people are uncomfortable with the "open" concept of wikis. More difficult to attach and link files to then other collaborative platforms.

WHO example: Craig Lissner, coordinator, Reproductive Health and Research department, together with RHR colleagues, used wiki software to edit the RHR handbook in late 2008 and early 2009. Prior to using the wiki they had a difficult time managing changes to the RHR handbook. The wiki made this collaborative and distributed editing process more efficient as department members were able to add and edit contributions directly.

GoogleGroups is a free collaboration tool that is accessible to anyone with Internet access. It provides the basic functionality for online discussion forums, wikis, document storage and document sharing. It is not an ideal tool when high levels of security are required, or when part of a knowledge network has limited Internet access.

GoogleGroups

Pros: Free and easy to setup virtual collaboration platform. Does not require additional training.

Cons: Individual support for tool use not provided. Corporate entity (Google) owns and controls the operating system.

WHO Example: Philippe Boucher and Alim Khan of the Health Care Informatics unit, department of Health Statistics and Informatics, are currently using GoogleGroups to prepare for an upcoming global Health Metrics Network meeting in Kigali. Using GoogleGroups, the Health Metrics Network is generating member participation, formalizing the Kigali meeting agenda, and providing a space for the introduction of new members months in advance of the meeting itself.

Link: http://wiki.healthmetricsnetwork.info/wiki-kigali

2.4 Web-based information sharing and content editing

WHO Intranet is the gateway to internally published information produced by teams and departments located at WHO headquarters and in WHO regional offices. There are separate intranet sites for each regional office and for HQ. If you are in a regional office and have difficult accessing HQ intranet sites or other regional office intranet sites, contact the Global Service Desk (GSD) directly. To be an administrator of a WHO intranet page, you must first receive training in the Intranet Content Editing and Publishing System (ICEPS) from the IWA team.

WHO Intranet

Pros: Allows for information sharing with all WHO colleagues. Any WHO staff member can contribute to an intranet site, provided the administrator approves their content submission. The intranet also has blog and wiki applications.

Cons: The multiplicity of WHO intranet sites can make navigation in search of information difficult for WHO staff members. There are plans to develop an integrated WHO intranet in the future.

IWA training link:
http://gva1swdiana.who.int/trainingforceuser/lpCourseOutline.aspx?id=204&ik=4F24D4D4D4E4E4D5399514D994E994E4F5054561D

2.6 Legal considerations

Whatever tool you choose to use to communicate with your network, be sure that you think about the necessary legal considerations before setting it up. Being a staff member of the WHO you need to make clear that any opinions or experiences voiced by network members are theirs only and do not reflect the viewpoint of the participating or facilitating organization. Such legal disclaimers are particularly necessary for online discussion forums and cross-organizational collaborative sites. We recommend making an appointment with the WHO legal team to discuss specific cases and questions.

Here is a sample, generic disclaimer for a knowledge network that includes non-WHO staff members:

Sample Liability Disclaimer

This system contains submissions from parties outside the World Health Organization. The views expressed in these submissions are solely the responsibility of the authors and do not necessarily represent the views of the World Health Organization.

The designations employed, and the presentation of the information on this system, do not imply the expression of any opinion whatsoever on the part of

3. Getting Started

Parts 2 through 4 of this guide will provide detailed information on how to create, manage and evaluate a knowledge network. Before moving to the next section, it is important that you have considered each of these questions:

- ➢ *Have you established a governance structure for your knowledge network, e.g. a steering committee, Board of Directors or advisory group?*

- ➢ *Have you defined your target audience?*

- ➢ *Do knowledge networks already exist that you can share resources with or build membership from?*

- ➢ *Will the knowledge network be geographically dispersed? Will members be speaking different languages?*

- ➢ *Will you have the support of a co-facilitator?*

- ➢ *If you are going to be the lead facilitator do you have these responsibilities written into your Terms of Reference?*

- ➢ *Have you considered any legal requirements for your knowledge network?*

- ➢ *Have you assessed which collaborative platform is most appropriate for what you want to achieve?*

> ➤ *Will you be using one of the WHO corporate platform for the first time? Will you require technical training before using a given communication tool?*

> ➤ *Have you considered the time frame for the knowledge network?*

Once you have thought about these preliminary issues you are ready to move to part 2 of this guide.

Part 2: Creating Knowledge Networks

Introduction…………………………………………………………………………

1. Clear Objectives, Clear Demand……………………………………………………….
2. Targeting Potential Members…………………………………………………………
3. Support and Skills Requirements……………………………………………………….
4. Timelines and Outputs………………………………………………………………...

Introduction

Knowledge networks can be vibrant and productive communities, enabling collaborative work and dialogue across units, departments, regional offices, and with external partners. Given the many different methods of knowledge networking, from online discussion forums to videoconferencing to virtual workspaces, there is no single recipe to follow when creating a knowledge network. There are many ways to bring people together to share expertise and work towards common objectives using virtual communication tools. The key to success no matter the type of knowledge network is careful planning. Included in Part 2 are recommendations and case studies to guide you in the initial planning and creation of a knowledge network.

1. Clear Objectives, Established Demand

When there is an established demand for a knowledge network and clear benefits for members if they participate, the chances for success are high. Knowledge Networks *work* when they enable members to access the information resources they need and provide opportunities to participate by sharing their knowledge and experience. A knowledge network should be set up with an established assignment or objective in mind, such as the review of a policy document, the planning of a conference, or a global discussion on a topical and challenging issue. Before you begin targeting potential network members, we recommend answering the following questions:

- ***What will be the objectives of the knowledge network?***

    Will the knowledge network also help to achieve the objectives of your unit/department/organization? Will the knowledge network produce concrete outputs?

    Clear objectives are a prerequisite for a successful knowledge network. Defining concrete outputs in advance can keep the knowledge network from deviating from established objectives, as well as helping members to understand the value of their input. Similarly, aligning the objectives with unit/departmental/organizational/external partnerships objectives can result in greater buy-in for the knowledge network. Knowledge networks that provide members with the opportunity to solve urgent problems or issues by working collaboratively can quickly achieve a life of their own.

- ***Do you have a governance structure to help you plan the creation and management of the knowledge network?***

    It is important to establish and plan a framework of activities for the knowledge network from the start. A governance structure is essential to defining knowledge network objectives and planning activities. Having a governance structure – advisory group, Board of Directors, or core steering committee – can also help to map out sources of potential network members and leverage their leadership capacity to bring in new members.

- ***Are there incentives in place to promote or discourage member participation?***

    It is vital that you make clear to potential members the added value of their participation. Participants/members will ask "what is in it for me?" and they must be provided with the answer to this question. Participation benefits might include: accessing professional networks of value of their work, providing input to global policy discussions, participating in the

organization of a conference, and/or accessing information and expertise of value to their work.

CASE STUDY: *Creation of a Knowledge Network*

According to Christopher Bailey, Coordinator, Unit of Health Care Informatics (IER/MHI/HCI), "the communities that start up for their own sake quickly become irrelevant. What binds a community is an urgent problem or issue that they cannot solve for themselves." He learned this lesson facilitating the Open Medical Records Systems (MRS) Network, launched in 2004 with the support of the WHO KMS department. The network was created in response to the urgent need for improved e-health records systems for HIV-treatment in Africa. Through online discussion forums, monthly conference calls, and an annual meeting held in Cape Town, South Africa, Open MRS Network members share their expertise and experience. As a result, innovative approaches to medical records systems, such as the use of workstations that function with limited electricity supply, quickly spread to clinical teams and information managers in sub-Saharan African countries. The knowledge network organically grew in response to a real need and a shared sense of urgency. The network helped show that the use of innovative records systems meant that a single clinical team could go from seeing 30 to 90 patients in one day. Members were motivated to join and continue their participation because the knowledge gained from the network helped them solve the shared problem of e-health record keeping in low-resource settings.

---

2. Targeting Potential Members

There can be no knowledge network without network members. Once you have established clear objectives, the next step is to define the target audience. Identifying potential network members is an evolving process. In order to bring the right people together to establish a successful knowledge network, it is important to first answer these questions:

- ***Who do you need to involve in the knowledge network?*** *Are you targeting one type of audience or multiple audiences?*

  If the subject is pre-defined, such as preparing a manual or reviewing a document, then a network may already exist. In this case, you may want to ensure that this existing network is fully representative of the group you need to engage with.

If the network is being created to address an information need, to promote the sharing and exchange or knowledge, or to seek opinions on different practices or technical issues, then you may need to undertake a mapping of potential networks, organizations and agencies that may have an interest in this information need

- *Are there existing networks or gathering events that can be used to reach potential network members?*

  If your target membership is large and crosscutting, it works best to advertise your knowledge network via existing networks (email list-serves, email newsletters, community web pages) and gathering events (conferences, online and face-to-face meetings). Getting the message out this way serves two purposes; 1) it helps to avoid duplication of effort by identifying potential areas of collaboration and knowledge sharing with existing networks; and 2) it allows you to canvass a broad range of potential members.

  If you intend to host a global online discussion forum, it is best to allow at least a month to identify, invite and sign-up participants. The broader your intended membership, the more time you will need to establish membership. If your target membership is small, then an announcement or invitation circulated by e-mail may be sufficient.

CASE STUDY: Identifying and Targeting Knowledge Network Participants

The process of identifying and reaching potential knowledge network participants varies greatly depending on the objectives and scope of the network itself, as WHO experience has demonstrated. For example, in advance of the first Global Health Workforce Alliance (GHWA) online discussion forum in 2009, WHO Technical Officer Erica Wheeler helped build momentum and bring in participants through already existing networks. Tapping into the 15,000 members of the Implementing Best Practices in Reproductive Health Knowledge Gateway, hosted by WHO, provided the GHWA with one source of participants. A GWHA conference in Uganda offered another opportunity to announce the upcoming discussion forum and gather potential participants' emails. Finally, Erica Wheeler used her attendance at a key meeting in Kenya with senior midwives and nurses from 21 different countries in Africa to invite additional participants.
As a result of this canvassing, the GWHA's inaugural nine-day online discussion forum on "task shifting" brought in 243 new members to their knowledge network from 56 different countries

http://www.who.int/workforcealliance/knowledge/e_solutions/COP/en/index.html

---

3. Support and Skills Requirements

A successful knowledge network requires facilitators to cultivate technical skills, member support and resources *in advance* of the initial launch date. Answering the following questions will clarify the support and skills you might need for your knowledge network:

- ***Are there incentives in place to promote or discourage knowledge network facilitation?***

  If you are going to be a knowledge network facilitator, it is a good idea to get this written into your work plan. Facilitation does not require intensive input beyond the initial set-up period (with the exception of hosting an online discussion forum) but it does require consistent and ongoing effort.

- ***Will you need the support of a co-facilitator?***

  For a small time-bound knowledge network undertaking a specific assignment (reviewing a document, planning a meeting), a single facilitator is generally sufficient.

  For a large time-bound online discussion forum, full-time facilitation is required for the duration of the forum. In practice, it works best for global discussion forums to have two facilitators working in different time zones to ensure timely responses to all contributors.

  For an ongoing knowledge network it is a good idea to have two facilitators so that there is continuity of facilitation if one person has to leave the knowledge network.

- ***Will you need technical training on the communication tools you plan to use?***

  When developing a timeline, make sure to leave enough room in the schedule to allow for any technical training you might need. In addition to your own technical training needs, you also need to allot time to provide members with basic training on how to use the communication tools you have selected. For example, if you have set up a knowledge network using SharePoint and members do not understand how to log in to the network page, they will be unable to participate. It is important to provide them with basic guidelines and support in the initial stages.

- ***What support reference materials will knowledge network members need from the beginning in order to participate fully?***

Gather all the resources you think knowledge network members will need *in advance* of the launch date. Once your network is up and running you do not want to scramble to find documents or other reference materials that members need.

- ***What resources will you need available in order to make the knowledge network function beyond the initial launch?***

When you are in the initial planning stages, it is a good idea to plan future resource needs for the knowledge network. This can mean ensuring that knowledge network support responsibilities are written into the work plans of more than a single facilitator (in case that facilitator leaves their position). It could also mean allocating budget for future activities such as a videoconference session or a face-to-face meeting of network members.

CASE STUDY, part 1: Knowledge Network Support and Skills

For the WHO/RHR-led Reproductive Health Essential Medicines forum in June 2009, Margaret Usher-Patel, Scientist, and Catherine Richey, Technical Officer, planned the discussion by first identifying representatives from five other agencies working in the field of reproductive health essential medicines that could act as a steering committee for discussion topics, promote the discussion within their own networks, and provide expert commentary during the discussion. This proved key in terms of generating support for the two-week online discussion forum and getting the word out to a wide range of potential participants, which numbered nearly 400 from 79 countries. As one of two global facilitators, (the other a consultant based in California), Catherine Richey found that her working knowledge of the discussion topic was crucial to synthesizing the contributions into a daily digest. In addition, having facilitators in two distinct time zones enabled a near-seamless sorting and posting of discussion comments. Both facilitators in this case had previous experience using the IBP Knowledge Gateway platform for online discussion forums, so no additional technical training was required before getting started.

<div style="border:1px solid black; padding:10px;">

CASE STUDY, part 2: Knowledge Network Support and Skills

The ePortuguese knowledge-sharing platform (http://www.eportuguese.org/php/index.php) is another good example of the kinds of the skills and support requirements for knowledge network success. In this case, the platform was first created in 2005 to support the development of human resources for health in Portuguese-speaking member states. One of the principal objectives of the ePortuguese initiative was to create a Virtual Health Library (VHL) where member states could upload and share health literature, events, legislation and policy documents, as well as hosting online discussions. VHL organizers encouraged participating countries to identify and train their own system facilitators and administrators. This shared facilitation strategy has resulted in greater member ownership of the VHL and increased sustainability of the project.

</div>

4. Timelines and Outputs

The timelines and outputs you establish will depend entirely on the kind of knowledge network you are trying to achieve. Whatever timelines and outputs you decide on in advance, it is necessary that you remain flexible and responsive throughout the process to the needs of your members. A knowledge network is an evolving entity and you cannot predict how it will change over time, but a timeline will help keep the knowledge network on track towards achieving established outputs. Here is a sample timeline taken from an IBP Knowledge Gateway online discussion forum:

Time Interval	Task	Responsible Organization
1-2 months before launch	Decide on forum title, weekly themes, facilitators, moderators, background readings and experts	YouthNet/FHI with input from INFO/K4H
	Set up the online community & add materials to community library	INFO/K4H
	Develop forum flier, announcement, welcome e-mails and promotion plan	INFO/K4H & YouthNet/FHI
	Plan and finalize forum evaluation and indicators	
		INFO/K4H & YouthNet/FHI
1 month before launch	Begin marketing and promotion of forum	INFO/K4H & YouthNet/FHI
	Sign up interested participants & send them username, password and ground rules	INFO/K4H
	Finalize plan for how forum will be conducted and develop a flowchart for weekly and daily tasks	INFO/K4H & YouthNet/FHI

Time Interval	Task	Responsible Organization
1 – 2 days before forum	Send out e-mail with information on how to participate and forum ground rules	INFO/K4H
At start of last week of forum	Circulate forum evaluation (as e-mail and link to online survey)	INFO/K4H
At completion of forum	Complete analysis of evaluation and send out final forum e-mail that includes: • summary of discussion • summary of evaluation • complete list of links to readings	INFO/K4H & YouthNet/FHI
Within 1 week of forum end	Post summary of full contents of forum on public website Conduct after action review and evaluation of forum	INFO/K4H & YouthNet/FH

Once you have considered carefully the recommendations in Part 2, you are ready to launch your knowledge network.
Part 3 of this guide will help you to understand how best to manage a knowledge network beyond the initial set up period.

Part 3: Managing Knowledge Networks

Introduction……………………………………………………………………

Introduction

In Part 1 and 2 of this guide we showed that successful knowledge networks must have: 1. a governance structure with a clear purpose and commitment to the network; and 2. clear value added for member participation. In this section we focus on the role of knowledge network facilitators. Facilitation is about creating an environment in which network members can feel comfortable sharing knowledge, information resources and experience with other members. While it generally helps to have some knowledge about the focus topic of your network, you do not need to be a high-level expert. In short, a facilitator is a go-between, combining administrative tasks with information synthesis and behind-the-scenes people management.

The facilitator is responsible for:

➢ Clarity of knowledge network objectives

➢ Focused discussions and meetings

➢ Participation opportunities for all knowledge network members

➢ Clear communication between knowledge network members.[2]

The methods used to facilitate will vary according to the specific needs of your knowledge network. In Part 3, we provide WHO case examples to illustrate some of the successful tactics and common challenges of knowledge network facilitation.

1. Facilitating a Knowledge Network

The first thing you need to know is this: you do not need an extensive background in facilitation to do a good job at managing a knowledge network. Novice facilitators can also be successful provided they are motivated, enthusiastic, open to the use of collaborative communication tools and capable of keeping the dialogue lively. In fact, often times it is the high-level subject matter experts who struggle to communicate in the simple, relaxed manner that online discussions, blogs and web-based meetings require.

Although there are many ways to facilitate a knowledge network, one key lesson emerges from WHO case studies: *knowledge networks do not run themselves*. There is a tendency for people to see knowledge networks, and the technology they involve, as a "quick fixes" for communication challenges. The problem with this way of thinking is that it tends to assume that a minimal amount of planning

---

[2] Adapted from the IBP Knowledge Gateway "Quick Start Guide for Facilitator(s) and Experts of Online Forums", and *Community of Practice Facilitation – Participant Manual* http://www.itrainonline.org/itrainonline/english/communication.shtml

and resources are needed. It is true that virtual communications technologies like the IBP Knowledge Gateway, SharePoint and GoToMeeting make sharing information a more cost-effective endeavor, but that does not mean there is *no* cost involved. The predominant cost is in the time and resources required of the facilitator, which can be easily written into an existing work plan.

Facilitation activities will depend on the kind of knowledge network you have set up. Common activities for all types of virtual knowledge networks include:

> ➢ Sending new members a personal welcome message, reminding them of the objectives of the knowledge network and providing guidelines for participation

> ➢ Providing technical support to members

> ➢ Filtering and synthesizing information posted to the shared site/workspace.

If you are setting up an online discussion group that is time-bound or ongoing, you will need to:

> ➢ Filter member comments on a shared site and provide a synthesis of member contributions on a regular basis (see point 5 of the IBP Quick Start Guide, Annex).

> ➢ Collate and summarizing online discussion threads. (see point 6 of the IBP Quick Start Guide, Annex).

> ➢ Coordinate face-to-face or virtual meetings as an add-on to web-based activities.

> ➢ Communicate individually with members offline when necessary, to make sure they understand how to use the knowledge network platform or to deal with any inflammatory comments.

> ➢ Provide members with an opportunity to use the network facilitator as a "sounding board" for their comments before they send them to the whole group

> ➢ Remain neutral – it is not the facilitator's job to agree or disagree with members.[3]

---

[3]Adapted from the IBP Knowledge Gateway "Quick Start Guide for Facilitator(s) and Experts of Online Forums" and from Lou Compernolle and Sarah Pouezevara, *A practical guide for managers, facilitators and users of (online) collaboration tools in the World Health Organization,* May 2008

Videoconference Moderation

A videoconference is a virtual meeting held in real time from different locations around the world using technology that allows you to see all participants on a video screen. A videoconference moderator is responsible for keeping the conversation moving between participants and on target to achieving the established objectives of the meeting. Moderating a videoconference requires a separate set of skills and considerations from facilitating an online knowledge network. Unlike an online discussion forum where there is a time lag between comments and response, you will need to direct conversation on the spot. Advanced planning is essential, as is the case with any meeting.

Before the videoconference it is important that you:

1. Identify site leaders
2. Identify participants
3. Test site connections at least once
4. Plan your agenda (allow for 1.5 - 2 hours)

Margaret Usher-Patel, RHR Scientist, recommends scripting an agenda to support the moderator in their role. She explains that, *"for a videoconference it is necessary to move the camera from one person to the next otherwise participants get bored. Time is short in a videoconference so it is important to ensure that all speakers keep to their allotted time. The moderator has to stay in control of the conversation. The moderator takes the questions and identifies who will respond to the question. It is important to guide the conversation so that you can draw conclusions and recommendations at the end."* For multisite videoconferencing, the moderator invites comments in turn. Participants signal to the moderator using the available technology.

To see an example of videoconference facilitation, go to:
http://video.who.int/streaming/vc29oct2008.wmv

2. Motivating Member Participation

This leads us to the issue of motivation. Once you have invested the time and effort into getting a knowledge network up and running, how do you motivate members to continue participating? The crucial factor here is advanced planning. When you are starting up a knowledge network it is good to think ahead to future opportunities, such as forums, conferences or meetings, that you can use as a jumping off point for online discussions or as en energizing opportunity for network members. If your knowledge network is open to new members, it is a good idea to allocate resources in advance for network marketing, such as printed postcards with your network's web (URL) address on it that can be handed out at conferences.

There is a delicate balance in motivating member participation past the initial launch period. You do not want to overwhelm people with information but you also need to continuously remind them that they are members of a knowledge network. Some examples of information "drip-feeding" to network participants include: monthly e-newsletters, monthly or quarterly digest summaries of information collated from a shared site, and bi-annual videoconferences. *"You cannot demand constant interaction from a global knowledge network"*, Margaret-Usher Patel co-creator of the IBP Knowledge Gateway explains, *"but the idea is to keep people engaged and to keep them involved."*

Case Studies: Keeping Knowledge Network Members Involved

Technical Officer Erica Wheeler manages the highly successful Global Health Workers Alliance knowledge network (http://www.ghwa.org/). An important factor in the success of this community is that there are multiple streams of communication and engagement opportunities available to network members. In the case of the GWHA, they circulate a quarterly newsletter as well as weekly updates to over 250 organizations. They use both a public website and the IBP Knowledge Gateway platform to disseminate information. In addition to virtual communication, every two years the GWHA organizes a global conference so that members can meet face-to-face.

If possible, it is a good idea to keep people involved in knowledge networks through periodic face-to-face meetings. Meeting face-to-face both helps to build trust and relationships between network members, and also provides a burst of energy to the group. The key is to provide members with regularly scheduled opportunities to share information and knowledge with one another. If there are large gaps between meetings or online discussions, then a persistent push of information out to members can help to keep them interested.

3. Language Issues

If you are working with a global audience, you will need to take the language needs of network members into account. This can mean anything from allocating resources for translation of key documents and comments on a shared site, to creating a language-specific sub-community to encourage open dialogue among non-English-speaking members. It bears mentioning that collaborative tools, like the Knowledge Gateway and SharePoint have options for changing language settings. This goes some way towards enabling non-English speaking members to successfully navigate a knowledge network site but facilitation is still required. If you are not facilitating a fully bilingual knowledge network we recommend that at a minimum you acknowledge, and when possible, translate the contributions of non-English speaking members.

CASE STUDY: Meeting Diverse Language Needs

One excellent example of a non-English speaking knowledge network is the ePortuguese Virtual Health Library (http://eportuguese.bvsalud.org). What began in April 2005 as a way to disseminate health information to Portuguese-speaking countries and institutions evolved into a knowledge network consisting of shared websites, blogs, discussion forums, online training, and collaborative workspaces. Regina Ungerer, one of the lead facilitators of ePortuguese, explains the rationale behind the creation of this unique knowledge network:

"One of the big issues [in knowledge sharing] is: how can information be accessible to these people if they only circulate in certain languages. The UN has only 6 official languages, for example, but the world has more than 5000 active languages. How do we expect that people can get and understand information if it is in a language they cannot understand?

So we decided that the WHO should work in different knowledge networks and ePortuguese was kind of the natural choice…There are eight countries where the national language is Portuguese, across four continents, and in four of our regional offices: AMRO, PAHO, EURO, and SEARO… Countries are now able to upload their health literature, events of health, legislation and interconnect with the other Portuguese speaking countries and they can do this in their own language."

4. Technology Barriers

As discussed in Part 1, it is important to select the collaborative tools that best suit the needs of your knowledge network. It is also important to ensure that members understand how to use the tools and that support is available to them when they need it. With that said, it can be the case that something as simple as "logging in" to a shared site prevents a barrier to member participation. As a facilitator you must be prepared to support members who are technologically averse and guide them through the process.

In some cases WHO-supported collaborative tools might not meet the needs of your knowledge network and you will have to seek out alternatives. It is important to keep an open mind about which collaborative tools will help you to keep your network energized and engaged.

For many people, the collaborative technologies that enable knowledge networks to function can be initially confusing, even intimidating. The important thing is not to get frustrated as a facilitator but to devote time to helping members better understand how the technologies work and what comparative advantages they offer. There will always be people who resist communicating in these new ways, but on the whole you will find that if the knowledge network proves itself useful to members the challenge of using new collaborative technologies is easily overcome.

5. Additional Resources

http://www.ewenger.com/pub/index.htm
Etienne Wenger *Cultivating Communities of Practice* (Cambridge, MA: Harvard Business School Press, 2002)

http://www.itrainonline.org/itrainonline/english/communication.shtml
(see especially the Facilitating a Community of Practice – Participants Manual)

http://www.km4dev.org/forum/topics/facilitating-networks-a-good
Facilitating Networks – A Good Practice Guide

http://my.ibpinitiative.org/Community.aspx?c=3087a85f-ba63-4b62-ba36-63a8d790e64b
Intrauterine Devices or Contraceptive Implants online discussion forum on the Implementing Best Practices (IBP) Knowledge Gateway

http://my.ibpinitiative.org/public/Default.aspx?c=1325c561-2b21-449e-880e-6623a1214707
GANM online community home page

http://www.connect2change.org/
social networking site for health promotion professionals

http://www.ghwa.org/
Global Health Workforce Alliance site – see the knowledge centre and e-knowledge sharing sub-site

Part 4: Monitoring and Evaluating Knowledge Networks

Introduction…………………………………………………………………………

1. Monitoring and Evaluation Concepts
2. Sample Interview Guide
3. Sample Summary Report
4. Online Resources

Conclusion……………………………………………………………………..

Introduction

Just as with any other project, monitoring and evaluation helps to ensure that a knowledge network is meeting its established goals and objectives. Monitoring and evaluation can help knowledge networks to achieve greater organizational legitimacy by demonstrating value – improved access to and use of information, time saved, costs saved, increased quality of decision-making and capacity building.

While the basic principles of monitoring and evaluation hold true for knowledge networks, there is no one systematic way to establish baseline data, determining indicators, or the specific mix of quantitative and qualitative methodologies. Depending on what kind of knowledge network you have created, your activities could range from monitoring website hits and sending out periodic member surveys to conducting in-depth interviews among participant groups.

This last section provides a brief overview of existing resources on knowledge network monitoring and evaluation, a sample survey and summary report from the WHO-supported IBP Knowledge Gateway, and a list of online resources.

1. Monitoring and Evaluation Concepts

How you monitor and evaluate a knowledge network depends on whether or not the network was established for a time-bound purpose, a time-bound discussion forum, or as an ongoing network. In the case of time-bound knowledge networks, it should be relatively straightforward to establish a baseline starting point. In the case of an ongoing knowledge network, the identification of an unfilled knowledge need at the beginning of the process can serve as the starting point from which to demonstrate improvements in participants' knowledge, strength of network relationships and access to and use of information over time.[4]

For virtual knowledge networks, monitoring can consist of quantitative tracking of network activities, such as the number of website hits, the number and countries of origin of contributions to a discussion forum, or the number of participants in a videoconference. You can also monitor the quality and subject relevance of contributions. If you are using a collaborative online platform, such as the IBP Knowledge Gateway or SharePoint, they come with a basic set of site monitoring metrics. These include, among other options: number of contributions made to site, number of members, geographic location of participants (IBP Knowledge Gateway), and the number of documents uploaded. It is possible for the IWA

---

[4] Richard McDermott, "Measuring Impact of Communities: How to Draw Meaning from Measures of Communities of Practice," *KM Review*, vol. 5 (2), May/June, 2002.

team or an external consultant to create more sophisticated metrics should they be needed.

Evaluation is a trickier category. Many of the evaluation techniques that can measure with accuracy the impact of a knowledge network are labor and resource intensive.[5] Subsequently, the most commonly used evaluation methods are network member surveys and short phone interviews, examples of which are provided later in this section.

For a comprehensive overview of possible M&E methods, Johns Hopkins School of Public Health Center for Communication Programs has produced the *Guide to Monitoring and Evaluating Health Information Products and Services*. This guide sets out 29 indicators to measure reach, usefulness and use, as well as the collaboration and capacity building, achieved by health information products and services. These concepts are defined as:

"**Reach** –the breadth and saturation of product dissemination. It describes the extent to which information is distributed, redistributed, and referred to by organizations and individual users.

Usefulness – The quality of information products and services that is appropriate, applicable, and practical. Usefulness may include such aspects as user satisfaction, quality, innovation, and relevance.

Use – What is done with knowledge gained from an information product or service. It is the way in which information products or services are absorbed and applied to institute or implement change (NCDDR, 1996; Malchup, 1993)." [6]

One of the drawbacks of this guide is that the primary focus is on measuring the reach, usefulness and use of information products, e.g. guides, online courses, and technical publications. It may not be practical to apply all 29 indicators to the measurement of a virtual knowledge network, but we recommend reviewing the guide to see which indicators might be useful to you. At a minimum, these concepts can help to frame the development of questions for member surveys and interviews.

2. Sample Interview Guide

---

[5] See: https://sites.google.com/a/cgxchange.org/evaluation-cop/home

[6] Sullivan, T.M., Strachan, M., and Timmons, B.K. Guide to Monitoring and Evaluating Health Information Products and Services. Baltimore, Maryland: Center for Communication Programs, Johns Hopkins Bloomberg School of Public Health; Washington, D.C.: Constella Futures; Cambridge, Massachusetts: Management Sciences for Health, 2007.
http://info.k4health.org/hipnet/MEGuide/MEGUIDE2007.pdf

Online surveys can be an effective way or receiving feedback on knowledge network activities. They do however have limitations. WHO experience shows that the average response rate for online surveys is only 10-14%, so the answers will not be representative of the knowledge network as a whole.

It is important to select a survey tool carefully as not all of them open easily in low-bandwidth settings. Commonly used tools include the WHO/IWA-supported DataCol tool and SurveyMonkey (www.surveymonkey.com).

If resources are available, it may be possible to draw a random sample of network participants and undertake either online or phone-based in-depth interviews with open-ended questions. This can prove a useful process to determine the effectiveness of the knowledge network.

On the next page is a sample interview guide which you may choose to use as a template, but do not feel bound to the questions suggested in this guide. The WHO/RHR and the Johns Hopkins Knowledge for Health Project developed this interview guide jointly to evaluate participation in IBP Knowledge Gateway online discussions. For a sample online survey, please refer to the IBP Quick Start Guide in Part 3 of this guide.

Sample Interview Guide for In Depth Evaluation for Online Discussion Forum Participants (WHO/RHR and Knowledge for Health Project, Johns Hopkins Center for Communication, 2009)

General Information:
1. Name of respondent
2. Organization type
3. Name of Forum:
4. Phone number:
5. Email address:
6. Date of interview:
7. Interview conducted by: phone ___ in person____ email_____
8. Interviewer:
9. Total interview time:

Hello my name is <**insert your name**> I am part of a team conducting in depth interviews following online discussion forums on the Implementing Best Practices (IBP) Gateway.

We would like to ask you about your experience participating in <**insert forum title>**. Your feedback will help us improve the way we conduct forums in the future.

The interview will take about 30 – 45 minutes to complete and you can stop the interview at any time. We are interested in hearing your true opinion – both positive and negative. Everything that you say today will be kept confidential.

I will be taking notes during the interview and would like to audio record this conversation to back up my note taking. The IBP team will be the only ones to read my notes and listen to the audiotape. Is it ok to audio record this conversation?

Let me stop for a moment to respond to any questions you may have. What questions do you have? [Pause to answer questions – then turn on the recorder].

1. Is this your first time participating in a forum on the Knowledge Gateway? If no, please tell me the other forums you have participated in.

2. How would you rate your experience of participating in this forum (*not satisfied at all, somewhat satisfied, satisfied, very satisfied)*? Why?

3. How useful do you think it was to involve guest experts in this forum (*not satisfied at all, somewhat satisfied, satisfied, very satisfied)*?

4. Regarding the level of activity in the forum, how active was this forum (*not active, somewhat active, active*)?

5. How would you rate your satisfaction with the content of the discussion (*not satisfied at all, somewhat satisfied, satisfied, very satisfied)*?

6. How would you rate the range and quality of forum participants? (*not satisfied at all, somewhat satisfied, satisfied, very satisfied)*?

7. How could the content of future discussions and/or level of activity be improved?

8. How cohesive do you think the forum was from beginning to end? How easy or difficult was switching between subjects?

9. How well do you think the forum met its goal of **[fill in forum goal]**?

10. Based on this forum, do you think another forum related to this topic is needed? If so, please describe sub-topics for future forums.

11. Did you participate in the forum by email or by logging into the IBP Knowledge Gateway?

12. What could forum organizers do in the future to improve your experience in a future forum like this one?

13. Do you have any other comments you would like to add?

3. Sample Summary Report

Whether or not your knowledge network is time-bound, we recommend that the results of surveys and interviews be compiled, synthesized and included in a summary report that is sent to all network members when completed. In doing so, the network's achievements are made more tangible for participants. The value of summary reports and survey results applies to both ongoing and time-bound networks. In ongoing networks, it is good for members to have evidence that their participation is contributing to the network's objectives. In time-bound networks, a summary document can be forwarded and archived so that the knowledge gained can be shared with others in the future. A summary of activities also provides the necessary background to support an evaluation.

The following extract from the WHO-sponsored Reproductive Health Essential Medicines Online discussion forum provides a useful template for a summary report, as well as an idea of what kind of member feedback you are working to achieve.

Extract from Reproductive Health Essential Medicines Online Discussion Forum (15 – 26 June 2009) Executive Summary

The World Health Organization Department of Reproductive Health and Research (WHO/RHR), in collaboration with several partners (see Appendix), convened the online discussion forum, "Access to Reproductive Health (RH) Essential Medicines: Why is it so difficult to achieve?" This two-week discussion was conducted as part of the Quality Medicines for Reproductive Heath Project, supported by the Bill and Melinda Gates Foundation. The purpose was to initiate a dialogue to define information needs and challenges in order to inform the development of an online resource portal for information related to RH Essential Medicines.

The discussion took place on the Knowledge Gateway (http://my.ibpinitiative.org), an electronic platform that connects people around the world working in the fields of health and development through virtual networks and online discussions to facilitate the sharing and exchange of knowledge.

Online Survey
Upon completion of the discussion, participants were asked to complete a short, 12-question online survey. A total of 50 participants completed the survey, a 13% response rate. Sixty-six percent of respondents were from developing countries. Most respondents heard about the discussion forum from a listserv email (46%) or a colleague or friend (40%).

Over 90% respondents reported being very satisfied or somewhat satisfied with the content of the discussion and that the forum definitely or somewhat met its goal of discussing the challenges related to access to RH essential medicines.

The discussion had significant impact on the work of most respondents. Nearly 80% responded that they plan to use resources or practices discussed in the forum in their work. Forty-three percent read materials suggested in the discussion, and 41% plan to do so. Over half (54%) of respondents forwarded forum postings to other people.

In-depth telephone interviews

Forum evaluators also conducted 13 telephone interviews in English, French, and Spanish. The participants were from India (3), Kenya (2), Cameroon (2), Ethiopia (1), Pakistan (1), Nigeria (1), Haiti (1), East Timor (1), and Peru (1). The feedback from these interviews was very positive. When asked about their overall impression of the discussion, the majority of interviewees called it "very educational" and also remarked on the wide range of participation. A participant from India commented on the timeliness of the topic, while a participant from Pakistan remarked on the importance of tools such as this forum that can reach the grassroots level and bring people together around these important issues. A participant from East Timor also noted "most of the participants faced similar challenges."

Respondents were also asked to give examples of how they were using the information from the discussion in their work. A participant from of Ethiopia stated that he will use information from the forum to help shape the Ethiopian government's upcoming assessment of RH commodity procurement. Others also commented that learning best practices in procurement had helped them improve their performance in this area. For example, a participant from India is now using a new forecasting model, which she hopes will reduce the incidence of stockouts.

When asked how their access to the information could be improved, respondents had several ideas. Several respondents wanted the information to be more organized by topic and easier to find. An interviewee from Pakistan expressed interest in an Internet portal to relevant websites. Many respondents, however, commented on the difficulty of accessing Internet regularly, and suggested face-to-face meetings and trainings. Finally, interviewees were asked how the information could be more relevant to their work. Several expressed interest in more case studies, especially from other countries in their region. One participant from of India also suggested involving more government officials in the forum, since they often have more power to implement policies and best practices.

4. Online Resources

Johns Hopkins School of Public Health, Center for Communication, K4Health project, *Monitoring and Evaluation Guide for Information Products and Services,* 2007
http://info.k4health.org/hipnet/MEGuide/MEGUIDE2007.pdf

KM4dev's wiki on Impact and M&E of Knowledge Management
http://wiki.km4dev.org/wiki/index.php/Impact_and_M%26E_of_KM

Richard McDermott, "Measuring the Impact of Communities: How to Draw Meaning from Measures of Communities of Practice"
http://www.kunnskapsnettverk.no/C14/C10/CoP/Document%20Library/Measuring%20the%20Impact%20of%20Communities.pdf

How to Measure the Impact of a Community of Practice
https://sites.google.com/a/cgxchange.org/evaluation-cop/home

How to Use KPIs in Knowledge Management
http://www.greenchameleon.com/gc/blog_detail/how_to_use_kpis_in_knowledge_management/

Survey Monkey
http://www.surveymonkey.com/

Conclusion

In this guide we have shown that successful knowledge networks must be carefully planned and they must provide members with added value, in the form of improved access to knowledge, information, resources and professional networks. While there is no single recipe to follow, the experiences of WHO colleagues, concise recommendations, and communications tools outlined in this guide will help you to create, manage, and evaluate a successful knowledge network.

The potential of knowledge networks to improve the sharing of expertise, know-how and lessons learnt in the field of global public health is tremendous. We hope this guide has inspired you to get involved as a core steering committee member, facilitator, or champion participant of a knowledge network.

On the next page, you will find a brief evaluation form. We appreciate your answers and input. The cumulative evaluations will be used to improve and strengthen the content of this guide for future readers.

Evaluation of Guide

1. How would you rate the usefulness of the information contained in this guide? (*not useful at all, somewhat useful, useful, very useful)*? Why?

2. How would you rate your satisfaction with the organization of content in this guide? (*not satisfied at all, somewhat satisfied, satisfied, very satisfied)*?

3. How would you rate the clarity of recommendations provided in this guide? (*not clear, somewhat clear, clear*)?

4. How would you rate the WHO examples provided in this guide? (*not useful at all, somewhat useful, useful, very useful)*? Please indicate which examples, if any, were very useful.

5. How could this guide be improved?

6. Do you have any other comments you would like to add?

Annex 1: IBP Quick Start Guide for Facilitator(s) and Experts of Online Discussion Forums – annotated version

The following guidelines are designed to explain your role as facilitator of an online forum conducted through the IBP Knowledge Gateway (www.ibpinitiative.org).

Facilitator

The facilitator runs the forum – much like the professor in a class. The facilitator should expect to spend between 1-4 hours per day working on forum related tasks during the course of the online forum. The facilitator is also responsible for:

1. Introducing each week's expert(s) and framing the weekly discussion within the overall theme of the entire forum.
2. Reviewing the compiled contributions from each day and composing an introduction to the daily digest that will be sent out the next day. The introduction usually includes the number of contributions, the countries from which the contributions came, and the issues covered by the participants.
3. Working with the expert(s) to get his/her daily comments into the daily digest for the next day. Send the daily digest (in a Word document) to your forum organizer early in the day. The forum organizer will send the daily digest to all forum members.
4. Closing the discussion at the end of the week with a short summary of what has been covered using some general closing points, and a brief introduction to the next week's topics if the forum is running for more than one week.
5. Reminding people about how to participate, how to access recommended readings or other resources, and other ground rules of the forum (staying on topic, not submitting extremely long postings, identifying yourself, your country and your organization, etc).
6. Working with each week's expert(s) to help them with their opening remarks and daily comments
7. Summarizing the entire forum at the end, thanking all the experts, and asking forum members to complete the survey.

Experts

Experts are the "guest speakers" of the online forum. The experts comment on postings, respond to questions, suggest further discussion, and recommend readings related to the topic for their week. Experts are usually responsible for participating for a specific week. They will organize and lead the discussion for that week. In advance of their week, they should:

1. Identify 2-3 goals for the week's discussion.
2. Select a few good resources to recommend to participants (must be items that are available publicly) and send those resources to the forum organizer.

3. Develop their opening statement that will launch discussion for the week.
4. Prepare some discussion questions.
5. Review the contributions each day and prepare comments, answers to questions, additional questions they want to ask, and points they want to make that may have been overlooked. Give these to the facilitator each day by an agreed upon time.
6. Be prepared to do any research or consult other experts in order to answer questions posed by forum participants.

Forum Organizer(s)
The forum organizer is responsible for all logistics for the forum.

1. Creating the forum registration page.
2. Compiling each day's contributions and sending them to the facilitator(s) well before the end of the working day.
3. Sending out each daily digest before midday.
4. Helping users with registration, forgotten passwords and other technical issues.
5. Making sure each digest contains information on how to post a message, how to download documents relevant to the forum, and what to do if you have a problem.

General Information

1. The IBP Knowledge Gateway e-mail system does not allow any images, colors, font features or HTML emails. Compose your daily digests and send them back to your forum organizer as a Word document, with no special features added. We will put the daily digest into the appropriate format and send to all forum members.

2. Try to organize your messages by using asterisks or numbers instead of bullets. Use extra spaces to separate ideas, comments, etc. Your forum organizer should be able to provide more assistance if needed.

3. Keep your messages short and clear.

4. Recognize individual contributions each time and thank expert(s) and participants for their comments.

Read on for some examples of typical messages that are sent out to forum members during a forum.

Examples of Typical Messages

1. Basic guidelines (can be sent out from time to time during a forum)

2. How the forum will work (sent out right before the start of the forum, usually 2-3 days)

3. General introduction to the forum (first posting of the forum)

4. Introduction to the topic of the week (first day of each week)

5. Daily digest (example of a daily digest)

6. Final posting (last day of the forum) includes survey explanation and instructions

1. Basic Guidelines for Participating in the Forum

This message contains general guidelines for participants that should be sent out a few days before the launch of the discussion forum. This information can also be sent out again one or two weeks into the forum if new people have joined.

Example:

When you reply via e-mail or post on the Web page:

* Please include your name, organizational affiliation and country to help everyone get to know each other better and help us keep records on participation by country.
* Always try to keep your comment related to the subject under discussion that week.
* Messages should be in English only. At this time we are not able to translate from or to other languages.
* All submissions will be identified by name and country unless you request otherwise.
* Messages should not exceed four paragraphs or about 500 words.

If you have a problem sending a message or posting online, contact info@ibpinitiative.org.

We hope you enjoy participating in the discussion!

1. To participate by e-mail, just click "REPLY" to one of the e-mails sent to you or send an email to the community email address (for example, youthandmedia@my.ibpinitiative.org). Your contribution will be included in the next daily digest. Be sure to include your name, organizational affiliation and country in your e-mail.

2. To participate online, you must log into the Implementing Best Practices Knowledge Gateway. To log-in go to the community at the community web site (for example, http://my.ibpinitiative.org/public/youthandmedia/). Click on LOGIN at the top right of the screen. Your username is your email and your password is the one you supplied when you registered.

At the community home page, click on the **discussions** link to respond or comment. At the next screen, click on the discussion item you want to respond to and follow the online directions. Or click on **start discussion** to start a new discussion. Discussions are the online version of e-mails. Your comment will not appear online immediately. It will be included in the next daily digest.

- - - - - - - - - - - - - - HINTS - - - - - - - - - - - - - -

LOST / FORGOTTEN PASSWORDS
If you forget your password to the Knowledge Gateway, you can give yourself a new password any time. Go to the log-in page at http://my.ibpinitiative.org and click on **forgot password**. Follow the online directions. If you still have a problem, send an e-mail to info@ibpinitiative.org

COMMUNITY LIBRARY
In the community library, you'll find useful documents with background information for this discussion, divided up by the weeks and topics.

2. How the Forum Will Work

This message gives people an idea of what to expect during the course of the discussion it outlines:

- ✓ **Start date and scope of discussion**
- ✓ **Who will moderate**
- ✓ **Who are the experts**
- ✓ **What kind of responses we are expecting (response, question, additional issue)**
- ✓ **What will happen to responses and why we are summarizing and sending out a daily digest**
- ✓ **Background readings and other resources**
- ✓ **How to post a message**

3. General Introduction to the Forum

This message contains a general explanation that should cover:

- ✓ **Welcome**
- ✓ **Who is organizing the forum**
- ✓ **What we hope to accomplish**
- ✓ **Starting date**
- ✓ **Duration**
- ✓ **Number of participants with some background (country of origin)**
- ✓ **Weekly themes and dates**
- ✓ **Themes in more depth with experts/guest panelists**
- ✓ **Thank you**

4. Introduction to the Topic of the Week

This message introduces the topic of the week and should cover:

- ✓ **More detail on the topic – why we selected it; how it relates to the overall theme and to previous discussion**
- ✓ **Information on the expert/facilitator**
- ✓ **Opening remarks of facilitator/expert(why they think it is important)**
- ✓ **A request for contributions**

5. Daily Digest

This message <u>can</u> include:

- ✓ **In the subject header the number of the digest following on the previous one (i.e. Digest # 1)**
- ✓ **A brief reflection on postings in general**
- ✓ **Comments on the individual postings (brief)**
- ✓ **Summary of postings (each one line)**
- ✓ **Actual postings, which can be arranged by topic or just in the order they were received**
- ✓ **Related resources (attached as links)**

6. Final Posting

This message should include:

- ✓ **A reminder that this is the final 'official' e-mail**
- ✓ **Some nice quotes/stories**
- ✓ **A big thank you**
- ✓ **Expectations on what is next (for example)**
- ✓ **Link to survey**

Basic questions to include in final forum survey:

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:
    ___ E-mail   ___ Online   ___ Combination of both

9. If you participated online, did you have problems logging on to the system?
    ___ Yes   ___ No

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 e-mail each day or would you have preferred to receive the e-mails as they were posted?
    ___ Liked the single digest

    ___ Would have preferred to receive the e-mails as they are posted?

14. Have you acquired new knowledge through your participation in this discussion forum?