Pan American Health Organization

World Health Organization

Regional Office for the Americas

5. HOW TO DEVELOP VIRTUAL DISCUSSION FORUMS EFFECTIVELY

Virtual forums are a solution to meet through electronic means when participants are not able to get together personally and projects allow asynchronous debates

Title	How to develop virtual discussion forums effectively
Version	2nd Revision , May 21, 2015
Definition	Virtual forums are a solution to meet through electronic means when participants are not able to get together personally and projects allow asynchronous debates
Objective	The objectives of a virtual forum are oriented towards solving problems, building ideas, sharing knowledge and/or developing good practices
Expected results	• Problem solving • Generation of ideas • Knowledge dissemination • Development of best practices • Lessons learned • Collective reflections
Premises	• **Motivation:** An open and free environment should be created to encourage creativity and free exchange of information and knowledge with strong personal commitment and freedom of speech • **Definition of rules**: they should promote the exchange of ideas without limitations or restrictions, promoting creativity and judgment building instead • **Productivity**: perceived as a secondary effect rather than as a primary objective, since the purpose is to learn from experience • **Group self-assessment:** There should be mechanisms that enable the group to perform an informal self-assessment of the critical route that will make it possible to achieve the intended results

Procedure

Phase I Design
This phase refers to preliminary and basic content issues previous to launching a virtual forum.

1. <u>Before starting</u>: Before starting the process, two things should be ensured: 1) your institution should allow the installation of a tool for conducting forums, in case the organization does not have one in place, and 2) the process should be supported by the use of a well-known methodology[1] understood by the project coordination team;

2. <u>Platform installation and configuration</u>: PAHO/WHO uses the [Kunena] platform, a [Joomla][2] component, for virtual forums. When an instance of this platform is configured, it is important to first include a series of basic contents relevant for legal purposes, namely:

   a. **Terms and conditions of use**. This information explains clearly the terms and conditions of use for participants, what they can and cannot do, that is, general rules of use for all participants;
   b. **Privacy policy**. This forum must include a link to the privacy policy of the Organization;
   c. **General disclaimer**. It explains that the information and opinions shared and expressed in this forum are the sole responsibility of the members of the community and do not represent the opinions of the Organization;
   d. **Participant's registration.** An electronic form should be enabled for participants' registration which also facilitates their agreement to the "Terms and Conditions of Use" and the "Privacy Policy".

   Refer to ICT4Health Community of the PAHO eHealth project, available at www.paho.org/ict4health/forum, for an example of this configuration

3. <u>Invitation and dissemination</u>: A forum allows establishing different discussions on different topics with the objective of solving problems, generating ideas, disseminating knowledge and/or developing good practices. Each discussion should be backed by the appropriate invitation and suitable dissemination.

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[1] We advise the use of PAHO's methodology for the development of Communities of Practice
[2] Joomla is a free content management system (CMS) which enables you to build Web sites and powerful online applications.

a. **Invitation:** invitations allow describing the aim of the intended discussion as well as the expected results. The basic structure of invitations should include:

   i. Basic information (on who is organizing the discussion);
   ii. Introduction (reference information to provide context to the intended discussion);
   iii. Objectives and expected results;
   iv. Consultation period (specify the duration of the discussion, especially in case of limited time);
   v. Methodology (make clear what methodology should be followed, including complementary activities, such as virtual seminars, and the products to be generated as the result of the discussion);
   vi. Moderators (basic information on the persons that will moderate the discussion. It is advisable that at least one of the moderators belong to the technical staff of the Organization to guarantee that the discussions will be consistent with the expected objectives);
   vii. Registration (provide registration information to the forum).

b. **Dissemination:** once the content of the invitation is available, it should be disseminated. Some of the channels available for dissemination are:
   i. Social networks
   ii. Web pages
   iii. Internal information bulletins
   iv. Specialized distribution lists
   v. Personalized Emails to people or institutions of special interest

4. Roles and responsibilities: This stage, which should be carried out in advance, includes selecting the people that will participate in the discussion, and the assigned roles and responsibilities of each participant. Besides, during this stage a decision should be made on whether the invitation will be public or limited to a specific group of people. The main roles are:

Leader: He/she provides guidance and managerial support but will not be necessarily involved in routine discussion activities. The leader may help in promoting discussions and providing orientation and motivation to the members of the community, as appropriate.

Moderator: He/she has a critical role in fostering the activity and participation in the discussion by forwarding information, posing problems and identifying new related topics that can help the community to evolve and grow. He/she is involved in activities such as moderating discussions, assessing comments and

information and drawing conclusions to be shared with the entire community. The moderator guarantees that the discussion is aligned with the objectives set.

Facilitator: He/she coordinates the discussion activities using asynchronous and synchronous tools. He/she also provides updates and promotes the discussion by sharing its purpose and mission inside and outside the Organization, as required.

Participants: The discussion members develop a shared repertoire of resources: experiences, stories, tools, lessons learned, best practices, ways to address recurrent issues, etc., in summary, a shared practice. This requires time and sustained interaction. They support and motivate one another.

Phase II	Development and implementation	In this phase discussion is started up together with the minimum necessary elements for its commencement.

For each discussion, it will be important to develop a basic structure common to all potential discussions, namely:

- Welcome: this topic will include basic information on the discussion as well as three sub-topics with the following information:

  o **Introductions**: all participants will be requested to introduce themselves virtually by providing their name, profession and their connection with the topic to be discussed;

  o **Guidelines for effective communication:** some rules of conduct will be established for participation in the forum. Some of them may be the following:

    ▪ Remember to SUBSCRIBE/UNSUBSCRIBE to the discussion topics to receive notifications by email in case of new entries. (It is important to check and mark as NOT SPAM in your email server);
    ▪ When writing messages, check that they are clear and relevant to the discussion topic;
    ▪ Treat the persons you are talking to with respect and courtesy;
    ▪ Be patient with those participants with a different pace of communication, either due to excessive or poor communication;
    ▪ Bear in mind that there will be participants from different countries and cultural differences generate differences in communication styles;

- Avoid sending very long messages, try to summarize your ideas in a few clear and concise sentences;

- If you need to share files, try to optimize their size to ease download;

- Maximum upload file size is 6000kb (6MB);

- File-types allowed are: txt, rtf, pdf, zip, tar.gz, tgz, tar.bz2, doc, docx, xls, xlsx, ppt, pptx, pps, ppsx;

- Maximum image upload size is 4000kb (4MB)

- Image file-types allowed are: image/jpeg, image/jpg, image/gif, image/png;

o **Invitation information**: this sub-topic will show the original information of the discussion invitation.

- <u>Support materials</u>: this topic will help to facilitate information and reference documents to provide context to the discussion;

- <u>Virtual seminars</u>: if virtual seminars are planned as a complement to virtual discussion, this topic will be helpful for announcing these invitations and to share the link to the recording and subsequent discussions generated as a result of the virtual seminar;

- <u>Technical questions</u> (discussion): the actual discussion will be developed here and it will include questions or technical comments to facilitate debate and discussion;

- <u>Technical summaries</u>: It is important that the coordination team, usually the moderator, makes periodic technical summaries of the main debates or comments to be shared with the group. This will allow re-connecting people who, for some reason, have been left behind in the discussions.

Phase III	Conclusions	Once the discussion is over, conclusions and next steps will be drawn up.

1. **Forum closure** (virtual meeting closing): It is advisable to conduct a final closing session to present the main conclusions and next steps, and to thank everyone for their participation.

2. **Formal acknowledgement to moderators and facilitators:** In order to build a strong network supporting future projects and guaranteeing the implementation of

recommendations of the forum conducted, it is important to write a formal and institutional appreciation letter highlighting the specific role played by each person.

3. **Delivery of participation certificates**: If considered appropriate and within the norms of the institutions, it is advisable to issue a certificate of participation in the forum. This kind of action creates an important synergy in subsequent events of similar characteristics.

4. **Technical report**. It is advisable to produce a technical report on the result of the discussion which, in a brief and executive fashion (30-40 pages) provides an answer to the expected results of the discussion.

5. **Next steps**. Next steps will be defined as a result of the discussion. They will include communication actions to present the discussion results.

Important: Record the metadata of the forums in the institutional repository of your organization. We suggest the following data structure:

- Forum name
- Main objective
- Thematic area (preset table allowing standardization)
- Expected results
- Responsible entity (preset table allowing standardization)
- Leader(s)
- Moderator(s)
- Facilitator(s)
- Digital file(s) of audiovisual material used
- Digital file of the final report
- Digital file with the list of participants