

INFO Checklist for Organizing an Online Forum

Online forums allow professionals from different parts of the world to come together virtually to raise questions, discuss timely and important issues, share experiences, and work together to develop new knowledge, ideas and approaches. Organizing an online forum is challenging and rewarding experience. Once you have identified your audience (their needs, interests and constraints) and thought through the objectives of your forum, your good and careful planning will insure that the interaction is lively and engaging, purpose-driven, and attracts a diverse range of people and perspectives.

This checklist was developed based on the lessons learned by The INFO Project in managing the *Youth and Pregnancy Prevention in a Time of HIV* online forum in 2005. This forum was co-sponsored with YouthNet/FHI and was conducted using the Implementing Best Practices (IBP) in Reproductive Health Electronic Communication System (ECS).

CHECKLIST:

1. Start with a realistic timeline.
2. Develop a theme for the forum and an outline for each week's discussion.
3. Identify and train moderators and experts.
4. Develop guidelines or ground rules for the forum.
5. Prepare promotional & forum support materials.
6. Develop a diverse marketing campaign.
7. Outline roles and steps necessary for the day-to-day technical operation of the forum.
8. Build in a feedback loop.

1. **Start with a realistic timeline.**

- Build in adequate time for promotion. This will ensure that enough people are involved and prepared to participate in the discussion. Allow a month for promotional activities.
- Include enough time to sign up (register/enroll) and inform participants about how to participate. This can take up to a week or more, depending on the numbers.
- Incorporate a review process for the content posted through the forum if this is an important issue for the sponsors.
- Consider time for training moderators and experts in advance.
- Include a wrap-up and evaluation at the end. It is important to do this while participants are still energized and the experience is fresh in their minds.

The following timeline was used for the *Youth and Pregnancy Prevention in a Time of HIV* forum. Each group took responsibility for different tasks. INFO led logistics and administrative tasks. YouthNet/FHI was in charge of planning the content and recruiting experts to serve as guest speakers for each week's discussion.

Timeline for *Youth and Pregnancy Prevention in a Time of HIV*

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
	Set up the online community & add materials to community library	INFO
	Develop forum flier, announcement, welcome e-mails and promotion plan	INFO & YouthNet/FHI
	Plan and finalize forum evaluation and indicators	INFO & YouthNet/FHI
1 month before launch	Begin marketing and promotion of forum.	INFO & YouthNet/FHI
	Sign up interested participants & send them username, password and ground rules	INFO
	Finalize plan for how forum will be conducted and develop a flowchart for weekly and daily tasks	INFO & YouthNet/FHI
1 – 2 days before forum	Send out e-mail with information on how to participate and forum ground rules.	INFO
At start of last week of forum	Circulate forum evaluation (as e-mail and link to online survey)	INFO
At completion of forum	Complete analysis of evaluation and send out final forum e-mail that includes: <ul style="list-style-type: none"> • summary of discussion • summary of evaluation • complete list of links to readings 	INFO & YouthNet/FHI
Within 1 week of forum end	Post summary of full contents of forum on public website	INFO & YouthNet/FH
	Conduct after action review and evaluation of forum	

2. *Develop a theme for the forum and outline for each week's discussion.*

Start with an overall theme for the entire forum. Then develop an outline for the content for each week's discussion. Include a list of relevant readings. Knowing the topics to be discussed each week will help participants prepare for and engage in the forum consistently and appropriately. The following is an outline of the content for each week of the INFO/YouthNet Online Forum.

Week 1 – Topic: The Needs of Youth for Pregnancy Prevention in a Time of AIDS

- Focus on varied reproductive health needs of married/unmarried youth; different needs of boys/girls; needs for both pregnancy and HIV prevention and forms of dual protection.
- Guest panelist: Ward Cates, President, Institute for Family Health, Family Health International

Week 2 – Topic: Especially Vulnerable Youth - Focus on Young Women and Girls

- Focus on why young women/girls are vulnerable to unwanted pregnancy and HIV infection, what can be done to prevent it and how to engage men and boys in this agenda.
- Guest panelist: Lynn Collins, Technical Advisor HIV/AIDS, UNFPA

Week 3 – Topic: Medical Barriers and Accessibility Issues

- Focus on defining medical barriers, WHO medical eligibility criteria, ongoing research (e.g. Depo and bone density), provider training resources, and accessibility issues such as institutional or legal barriers to contraception for youth.
- Guest panelist: Jim Shelton, Senior Medical Advisor, U S Agency for International Development

Week 4: Topic: ABCs of Pregnancy & HIV Prevention among Youth - Country Perspectives & Lessons Learned

- Focus on examples of successful programs using the combined ABC approach, additional strategies for pregnancy and HIV prevention.

3. Identify and train moderators and experts.

Experts. Subject matter experts add credibility to your discussion and create interest in participating. Brainstorm a list of possible experts and assign a member of your team to contact them. Experts should expect to spend at least the equivalent of about ½ to 1 full working day each week developing an initial statement and responding to postings.

Moderators. A skilled moderator can keep the discussion focused on the topic and moving at an appropriate pace with higher levels of participation. The moderator should plan to spend at least half of each work day during the forum assembling the discussion postings (if they are to be digested into a single, daily e-mail), working with the expert for that week, planning questions, and expanding and summarizing comments.

Training. Moderators and experts may need training in how to use the system, guidance on what to say or how to respond, and additional resources to insure that their experiences are rewarding and that their contributions are meaningful.

4. Develop guidelines or ground rules for your online forum.

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

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

- **Registration.** What registration options will be most appropriate for your audience? Online? Email? Both? Which options best suits their needs?
- **Extra help.** Will you post messages for people with poor Internet access or translate messages for people who write in languages other than English?
- **Evaluation.** How you will conduct your evaluation and share the results with participants?
- **Reminders.** Will you send out reminder emails during the forum to explain how to post a message, get help, or retrieve readings from the online library?
- **Moderation.** Will your forum be moderated (all postings must be approved)? If you have more than a few participants, you will probably want a moderated forum to screen out auto-reply e-mails and errors. What kinds of postings will you approve immediately, reject or conditionally approve? Will you send out the postings individually, as they are approved, or will you combine them into a single e-mail each day? Will this be done manually or is there a feature in the software that you are using that can digest multiple e-mails into a single e-mail? Will your moderator include comments on individual or digested postings to:
 - Suggest additional questions raised by the posting
 - Make a connection between the issue raised by the participant and another related issue.
 - Remind people when they have strayed off the topic or moved to a topic that will be covered later.
- **Summaries.** Will you provide periodic summaries of the discussion?

5. Prepare promotional and forum support materials.

Once you have a good idea of how your seminar or discussion will operate (your guidelines), draft your promotional materials and support materials. Try to anticipate and answer as many of the questions as possible that participants will ask.

The Invitation

Your invitation should present a concise, but convincing case for why prospective participants should join this activity. It should answer “what’s in it for me?” question in the first sentence or two.

Include the following:

- The scope of the discussion
- The time period
- The host or sponsor
- The purpose
- If the discussion will run over a long period of time, include a timeline that explains what topics will be covered during which time period. Make it similar to a syllabus that a professor or teacher hands out at the start of a class.
- How to register, giving people the various registration options (e-mail, online, how to make anonymous postings, etc.)

Reminders

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

Subject: [Youth Forum] How to Participate

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

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

2. Online: To participate online, you must log in to the Implementing Best Practices in Reproductive Health Electronic Communication System, or IBP/ECS for short. To log in, click on this link and then enter your username and password: <http://ibp.wa-research.ch/community.aspx?c=5960d00a-3015-43ab-9dbb-5c4ee0b4b943>. You'll be taken to the **Youth and Adolescents** community home page.

At the **Youth and Adolescents** community home page, click on **DISCUSSIONS**. To respond or comment, click on a discussion item, click on **RESPOND** and follow the online directions. Discussions are the online version of e-mails.

6. Develop a diverse marketing campaign.

Engage your colleagues and associates in coming up with an exhaustive list of prospective participants. As interesting as your topic will be, everyone will not participate. A good target to shoot for a well rounded discussion is at least several hundred participants. For each five participants, only one will probably post a message during the forum. The others will read postings and forward them to colleagues.

Take advantage of other electronic forums and newsletters to promote the forum. You may also be able to include a link in your e-mail which participants can use to self-register for the forum.

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

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

Develop guidelines for what kind of postings you will approve, reject or ask for additional information. For example, INFO and YouthNet developed the following guidelines:

Do not approve:

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

Approve with a comment:

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

Forward to the moderator:

- Postings that may be inaccurate or misleading about contraceptive effectiveness, research results, guidelines and standards
- Postings that are the opinion of the person, but are being presented as fact.

8. Build in a feedback loop.

Send out a brief survey after the forum (or near the end) to gather feedback from participants – especially from those who may not have actually have contributed to the discussion itself. Below are examples of the kinds of questions you can ask.

1. In which country do you work?

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

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

- I was very satisfied with the content of the discussion
- I was somewhat satisfied with the content of the discussion
- I was not satisfied with the content of the discussion

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

- There was the right amount of discussion
- There was too much discussion
- There was not enough discussion

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

- The Forum definitely met this goal
- The Forum somewhat met this goal
- The Forum did not meet this goal

6. Have you used any resources or practices discussed in the forum in your work?
 Yes No Not yet, but I plan to
7. Did you post any messages on the forum?
 Yes No
8. If so, did you participate in the forum primarily by:
 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

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