The Evolution of a Virtual Knowledge Organization:
Using Generic Social Networking Tools to Support Online Engagement

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Abstract

The creation and maintenance of virtual platforms for online communication, collaboration, and knowledge mobilization is a central challenge for international development organizations. Using inexpensive and easily-replicable approaches, the Virtual Platform Laboratory project explored how a small international development organization operating on a low-budget could operate as a virtual knowledge organization (VKO) through the use of widely available information communication tools and technology. Piloting a variety of approaches and techniques across seven different virtual platforms, the project team identified six key variables to consider when using ubiquitous social networking tools to build, foster, and sustain a VKO. As the proliferation, adaptation and evolution of generic social networking technologies continues to advance our collective networking capacities, careful consideration of these key variables can help other organizations exploring the use of these technologies to be clear about their capacity to support virtual teams, platforms, and organizations.

Keywords: Virtual platforms, social networking, online communication, virtual knowledge organization, knowledge sharing
1.0 The Research Problem

The creation and maintenance of virtual platforms for online communication, collaboration, and knowledge mobilization is a central challenge for international development organizations. Responding to the outcomes of IDRC’s CLF-2012 on virtual platforms, the Canadian Coalition for Global Health Research (CCGHR) developed a “virtual platform laboratory” to study and test some of the “12 key issues” identified at this February 2012 meeting. Strengthening Canada-wide CCGHR partnerships, this online research study explored how focused dialogue, information sharing, and engagement can encourage better collaboration and partnership building both within Canada and between Canadian and low and middle-income (LMIC) research partners.

Over the course of the study, the project team came to understand this challenge in the context of evolving virtual knowledge organizations (VKOs)—organizations designed to formally facilitate the sharing and co-creation of knowledge among geographically-dispersed but thematically-unified users. Using inexpensive and easily-replicable approaches, the project was an exploration of how a small international development organization operating on a low-budget could operate as a VKO through the use of widely available information communication tools and technology. Acknowledging that the generic social networking tools and platforms used during the project—such as Dropbox, Google Apps, and Wordpress—are indeed ubiquitous, the research problem evolved into determining how to make best use of these tools.

at an organizational level recognizing that these tools continually change (See Figure 1 below). As this challenge became clearer, questions that guided the project team’s research included:

- What individual and organizational capacities are required to support VKOs?
- How do small organizations take best advantage of the inexpensive tools available to function as VKOs?
- What are the most important variables to consider when using these tools to build, foster, and sustain a VKO?

![CCGHR Organizational Timeline and the Development of Generic Social Networking Tools](image)

**Figure 1: CCGHR Organizational Timeline and the Development of Generic Social Networking Tools**

### 2.0 Objectives

The overall objective of the project was to explore whether and how online focused dialogue, information sharing, and engagement can encourage better collaboration and partnership building both within Canada and between Canadian and low and middle-income research partners. This was to be done by creating, in a participatory way, an innovative and integrated virtual platform to serve as an open-access knowledge hub – facilitating communication, knowledge sharing, and collaboration – for use by global health professionals both in Canada and in low- and middle-income countries (LMICs). The hub was to serve as a “community of practice” on the use of virtual platforms, encouraging individuals and organizations to share and apply lessons learned. Specific objectives are listed below along with results.

**2.1 Create an Active Learning Group** to take part in a participatory process of building a new virtual platform. Consisting of research partners in Canada and several LMICs, this group will explore the role and purpose of the website to ensure that the tools provided are universally available and the approach taken can be easily taught and shared with others for future collaborative efforts both by CCGHR members and by other individuals and organizations.
• **Results:** The VPL project team consisted of fourteen core members representing seven separate “pilot” virtual platforms. The project team also engaged with colleagues on specific components of the project. Through our closed platforms and our public website and communications, the project directly interacted with 600+ membership, over 1300 Twitter followers, and over 640 Facebook followers. The CCGHR Board of Directors will be incorporating project findings into the CCGHR’s next strategic plan (2015-2019) to ensure active learning about ever-evolving online tools is formalized into the CCGHR’s organizational policies.

2.2 **Develop a Work Plan** guided by IDRC’s 2012 Canadian Learning Forum “Creating and Managing VPs: 12 Key Issues” summary.

• **Results:** A project-wide workplan resulted in monthly monitoring and evaluation meetings as well as monthly project team meetings. These meetings guided project planning and implementation. The learning and results captured on a regular basis was a key contributor to project findings.

2.3 **Explore Social Media Use** in effectively communicating about global health research with members, students, and the general public. Such outreach will encourage the broader CCGHR membership, other Canadian Learning Forum participants, and anyone else interested in engaging to be a part of the conversation. Using measurable engagement metrics, best practices for long-term engagement will be determined and shared.

• **Results:** The CCGHR incorporated social media strategies into the VPL by sharing opportunities, resources, and news in new and innovative ways. Twitter followers increased from 660 to over 1300 and Facebook Likes from 305 to 644. These changes measure from the launch of the implementation phase on January 1 2014 to the submission of this report on March 31 2015. Tracking engagement on both Twitter and Facebook and through online metrics the project team was also able to learn about what resources are most valued by our online communities, resulting in a dramatic increase in followers and support. Based on this learning and in combination with background research of social media literature, a set of open access modules were developed by the project. Aimed at providing guidance for non-profit organizations learning about the organizational capacity needed to successfully use social media, the modules were launched on the CCGHR’s website in June 2014.² The CCGHR has also recently started to experiment with the use of social media platforms to coordinate information sharing for specific projects.

2.4 **Create interactive “Work Spaces”** for specific CCGHR working groups and institutional members. Using trial spaces, best practices for communication and collaboration will be identified. Potential tools include blogs, forums, social media, and online collaboration tools. Guides on building, promoting, and maintaining a work space will be made publicly available for possible adaptation by other research groups both within the CCGHR and beyond.

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² These modules can be accessed on the CCGHR’s website: [http://www.ccghr.ca/resources/social-media-modules/](http://www.ccghr.ca/resources/social-media-modules/)
• **Results:** The project team built online platforms using the common website management platform *Wordpress*, a structure that can be easily adopted and adapted by others. Seven trial work spaces were launched in January 2014 and were complimented by the use of inexpensive social networking tools such as Google Apps, Dropbox, Skype, and Webex. Additionally, the CCGHR created two new platforms for other CCGHR project teams and created a private platform for internal communications amongst leadership. We also made major changes to our private membership platform to better serve members. The success of platforms varied, revealing six key factors that need to be seriously considered to by small development organizations using ubiquitous social networking tools (see Section 6.1 for details).

2.5 **Develop a long-term “Sustainable Management Plan”** that will identify resources needed for institutional and/or individual members to effectively manage an online “work space”. This plan will include budgets for time and financial resources so that an online work space can be adopted into future funding proposals.

• **Results:** The CCGHR Board of Directors is incorporating the proposed sustainable management plan into the organization’s 2015-2019 strategic plan. The plan will clearly outline the capacity necessary to support any online platforms and will be used for broad organizational planning as well as specific project plans that require online platforms and support. As a result of the project, the CCGHR is also developing an evaluative tool that will formalize how the CCGHR reflects on its capacity to succeed as a VKO. The tool will ideally become a public resource once it has been piloted by the CCGHR. It will focus on the six key factors identified during the project and will be used to gauge an organization’s capacity for supporting virtual platforms and project teams.

2.6 **Communicate research and results with other attendees of IDRC’s 2012 Learning Forum.** At the project outset, Learning Forum participants will be contacted with a summary of the project and an invitation to engage with the project team and/or follow project progress via monthly blog post updates. Subsequent notifications will be sent at the project’s halfway mark as well as at the end of the project, sharing lessons learned along the way while inviting continued participation and feedback via online comments and contact forms.

• **Results:** With the help of IDRC colleagues, the blog we launched in January 2014 was shared with Learning Forum participants. We have also shared our findings with CCGHR members on a regular basis, including presentations at annual meetings of the CCGHR Board of Directors, the CCGHR’s University Advisory Council, and at the CCGHR Annual General Meeting. An oral presentation on project findings was given at the 2014 Canadian Conference on Global Health. Resources developed as a result of the project are also being shared with our members and social media communities on an ongoing basis.

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3 This free and open-source web management tool can be used with minimal web hosting costs, and is easy to learn. As the default product for website development, *Wordpress* is the best option for creating a modular and easy to build product that both Canadian and LMIC partners could reproduce with the appropriate guides. Learn more about *Wordpress* at: [https://wordpress.org/](https://wordpress.org/)
basis. This report will also be shared broadly once it is made publicly available on IDRC’s website.

3.0 Methodology

3.1 Outcome Mapping as a Framework for Evaluation

The VPL was designed from the outset to allow the organization to learn and improve upon its work over the course of the project. The VPL team used Outcome Mapping (OM) as an evaluation method to ensure lessons were captured and fed back into the project. During the planning phase of the project (July to December 2013), this involved developing both a vision and mission to guide the project as well as a set of “outcome challenges” to guide the work of seven pilot virtual platforms over the course of a year (See Figure 2 below for more information). Each platform used open access Wordpress software and was complimented by a variety of other inexpensive online tools—email, Dropbox, Google Docs, Skype, Webex and teleconference calls—to support the outcomes each platform identified.

![VPL Project Structure Diagram]

The platforms were launched in January 2014, with the progress of each tracked over a twelve month implementation phase from January to December. The outcome challenges developed during the planning stage of the project were used to guide monthly platform-specific monitoring and evaluation, while monthly team meetings were used to share lessons and observations across platform experiences (See Figure 3). These sessions allowed team members to reflect on both quantitative and qualitative outcomes as the project progressed. Monthly team teleconferences were framed for information sharing amongst team members on opportunities and challenges, and also allowed for focused discussion on common themes arising across the project.

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4 See Appendix 1 for VPL Vision, Mission, and six Outcome Challenges. Given the similarity between the goals of the Cameroon Canada platform, the Zambia Canada Research Partnership outcome challenge was also used for the Cameroon Canada team.

5 See Appendix 2 for the monthly questionnaire used to facilitate monitoring and evaluation for each platform.
Through this approach the CCGHR was able to develop an ongoing feedback loop of organizational learning that helped staff, leadership, and members understand what was working, what wasn’t, and to discuss potential changes to platform strategies. Using this approach, we identified common variables of success (see Outcomes section of this report for details).

The CCGHR is using this learning to develop a self-assessment tool to measure the capacity of specific platforms. The tool will be used to share the project results in a forthcoming paper for peer review.

3.2 Challenges for Discussion

While the CCGHR gathered quantitative statistics based on the use of each platform, these statistics did not capture enough information to be easily combined with the project's broader qualitative observations in any meaningful way. Thus, the focus of our forthcoming paper is on the qualitative outcomes in terms of organizational capacity that is necessary to support a virtual knowledge organization, something that is not always easily measurable (hence the CCGHR’s work to develop a tool to help gauge organizational capacity).

Additionally, although most of our pilot platforms were able to complete monthly monitoring and evaluation on a regular basis, some struggled to do so on a regular basis. This meant that in some cases we were not able to gather as much information as initially planned. This challenge mostly came where colleagues who were volunteering their time on the project were unable to take additional time to complete monitoring and evaluation. Though this resulted in a lack of
data this experience raised a central issue for the project with respect to the capacity of volunteers. The project team acknowledged this within project findings and is developing a module to speak to this aspect of virtual platform management.6

3.3 Opportunities for Continued Learning

Overall, the regular use of OM in informing organizational learning and change was a positive outcome of the project. Developing a routine approach to monitoring and evaluation that combined individual platform reflections with monthly project team calls helped to frame our learning in a managed and coordinated way. Developing a habit of continual reflection helped us to work through our experiences together (speaking about successes and challenges) and to collectively discuss possible approaches to improve our work. The CCGHR is adopting this in our ongoing virtual learning and the use of OM by others experiencing similar challenges is a central recommendation of the project (See Overall Assessment and Reflections for more details).

4.0 Project Activities

The first six months of the project—the planning phase—were spent planning for the launch of six separate “closed” virtual platforms while also planning to test the potential of an “open” virtual platform to share knowledge via the use of blogs and social media platforms. The following twelve months of the project—the implementation phase—involved launching the platforms and piloting them over the course of 2014.

4.1. The Planning Phase

Phase 1 of the project involved a comprehensive Outcome Mapping (OM) process. This saw the creation of a vision and mission and the identification of seven unique pilot groups. Separate outcome challenges and progress markers were developed for each group.7 During this phase six trial platforms were also built to develop and test strategies and tools to help each pilot group work towards the outcome challenges and progress markers they had identified. The seventh platform used for testing was the CCGHR’s public website – http://ccghr.ca – which was built before the project launched.8

Serving as team-specific knowledge and communications hubs, work spaces used a variety of online tools to coordinate these networking efforts—including blogs, email, Dropbox, and teleconference calls. Each pilot platform made use of a combination of these tools to work towards pre-identified goals (see Figure 4 below):

6 This module will be part of a series of modules capturing the CCGHR’s learning that will be used in future CCGHR partnerships and will also be made available on the CCGHR’s website for use by other organizations.
7 See Appendix 1 for VPL Vision, Mission, and Outcome Challenges.
8 For additional outputs that resulted from planning phase activities please see Section 5 – Project Outputs.
4.2 The Implementation Phase

Phase 2 of the project was launched in January 2014. Over the following year, the CCGHR used a variety of strategies to promote online knowledge sharing and collaboration across each of the seven pilot platforms. Three further platforms – two to support other CCGHR projects and one to connect our Secretariat, Board of Directors, and Program Leaders - were also developed. Monitoring and evaluation of each of our initial pilot platforms took place on a monthly basis with learning from these sessions shared with the project team during monthly team teleconference calls.
5.0 Project Outputs

5.1 Phase 1 Outputs:

- **VPL Project Website** (http://ccghr.ca/vpl/): Used to provide weekly updates to team members as well as other project details, the website is also a template for other VP’s developed for the project.
- **VPL Pilot Platforms**: Platforms were built using a common template.\(^9\)
- **VPL Learning Centre**: A sub-site of the VPL Project site, provides links to a variety of resources, including VPL Project outputs and general literature on network building. Will be added to the CCGHR’s public website in 2014.
- **Online Engagement 101 | Best Practice and Lessons Learned**: Developed based on inputs from Mara O’Brien-James (CARE Canada, VPL team member) and Erin Hetherington (CCGH) the guide incorporates learning shared at LF-2012 and will be incorporated into both Open and Closed VP Guides.
- **Virtual Platform Work Space Startup Guide**: Developed to help Work Space Coordinators understand the VPL template and take the initial steps to engage with their users, encourage buy-in, and plan for a successful VP. This guide has served as a framework for planning and will inform the more comprehensive Open and Closed VP Guides to be developed over the course of 2014.
- **Historical Scan**: Based on the Outcome Mapping framework used to plan the VPL, this document reviews the CCGHR’s organizational history with regards to online communication, addressing the LF-2012 Key Issue of framing your VP within a wider KM strategy. The scan was particularly helpful for team members who were not familiar with the CCGHR’s past.
- **VPL Project Visualization**: Based on our experience with Outcome Mapping as a planning framework, a visualization of the project team was developed so that team members could understand how all of the different project pieces came together.
- **Poster at Canadian Conference on Global Health (CCGH) 2013**: Our application to share the VPL during a workshop at CCGH 2013 was denied, though we were able to share a successful poster presentation that garnered interest in the common challenge of online engagement.

5.2 Phase 2 Outputs:

- **Report to CCGHR Board of Directors**: A report capturing the CCGHR’s learning during the VPL was developed and shared with board members to inform an October 2014 strategic planning retreat.

\(^9\) See Appendix 3 for Phase 1 Outputs and Appendix 4 for CCGH 2013 poster.
• **Presentation of Findings at CCGH 2014:** An oral presentation at the 2014 Canadian Conference on Global Health shared VPL outcomes with conference attendees.

• **Online Engagement Database:** A database to track the progress of each of our six closed platforms and our open (public) platform. The database included a location to track metrics regarding platform use, social media, and the response of CCGHR membership to targeted emails.

• **Monthly Monitoring and Evaluation Reports:** Each month our Connectors completed an online form that aligned with their platform-specific outcome challenge. These forms were based on questions posed for an outcome journal. Monthly results informed the shaping of team teleconference calls that took place the week after individual platform evaluation.

• **Communications Review:** The most recent CCGHR Communication Strategy (2011) was reviewed for potential synergies with the VPL. Issues identified were brought to the CCGHR’s leadership for discussion and will be applied to future strategic planning.

• **Social Media Modules:** Developed to support non-profit organizations as they explore the potential to build their social media capacity, these modules went live online on July 1 2014.

• **Quarter 1 Update:** A blog post to summarize our learning over the first quarter of 2014 was shared in April. It can be accessed at: [http://www.ccghr.ca/blog/virtual-platform-laboratory-project-update/](http://www.ccghr.ca/blog/virtual-platform-laboratory-project-update/)

• **Platform Specific Updates:** Including our own project platform there were 155 closed platform updates over the course of the project.

• **Public Blog Posts:** The CCGHR published 39 blog posts on our public website over 2014.

5.3 Outputs Still To Be Completed:

• **Paper for Peer Review:** This paper will capture the CCGHR’s experience as an evolving virtual knowledge organization learning how to develop strategies and capacity for using ubiquitous social networking tools.

• **Modules for Online Engagement:** Initially proposed to be developed as two separate sets of modules for open and closed platforms, one set of modules to share common issues for all platforms is being developed. This set will include practical aspects of getting started while focusing on the organizational capacity needed to support a virtual knowledge organization.

• **Virtual Knowledge Organizational Capacity Evaluation Tool:** Being developed in step with the paper for peer review, this tool will help the CCGHR evaluate its organizational capacity when considering new projects or initiatives and when reviewing existing projects and initiatives. Ideally this will eventually become a public tool to compliment the modules.
6.0 Project Outcomes

6.1 Identification of Key Variables for Small VKOs

The VPL helped the CCGHR identify six key variables that are crucial to its success as a VKO. While many of the variables are reflected in the literature on virtual platforms and VKOs, the CCGHR’s experience reinforced the importance of these key lessons for similar international development organizations using ubiquitous social networking tools:

1. **Moderators Require Time, Skills, and Training:** Platform moderation involves dedicating significant time to communicate with members—often on an individual basis—and requires communication, leadership, and management skills to motivate members. Platforms where moderators had more time, skill, and training support were more successful in terms of both platform usage and outcomes.

2. **Platform Structures Must Respond to User Needs:** VPL platforms were built based on a general template that was then adapted based on the needs of each platform. Platforms that responded to the needs of members and changed accordingly were more successful than those that didn’t.

3. **Engagement Style Must be Service-Oriented:** Platforms that balanced a high level of responsiveness to individual members with regular and reliable communications were much more successful than those where moderators were less responsive or where communications were more sporadic.

4. **Regular Evaluation and Reflection Builds Capacity:** Platforms that developed a routine of regular evaluation and reflection were better able to identify opportunities and challenges in order to change strategies.

5. **Individualized Attention and Support is Required for LMIC Partnerships:** Platforms that engaged only with colleagues based in Canada were much more effective. Platforms with colleagues based around the world or in specific partner countries had difficulty bridging communications norms, cultural differences, and unequal access to Internet-based tools. Platform coordinators need more time and resources to support partners at an individual level to work through such challenges.

6. **Volunteer-coordinated Platforms are Difficult to Maintain:** Platforms that were coordinated by paid staff or by those who were able to volunteer more time were much more successful than those coordinated by student volunteers who were also in school and/or working full time.

As the proliferation, adaptation and evolution of generic social networking technologies continues to advance our collective networking capacities, careful consideration of these key variables can help other organizations exploring the use of these technologies to be clear about their capacity to support virtual teams and organizations.
6.2 Canadian & Low and Middle Income Country (LMIC) Partnerships

The VPL has been used to strengthen existing CCGHR partnerships while developing and building new partnerships, both within Canada and with our LMIC partners. Highlights of the partnerships being fostered include:

- An increased focus on partnership building with the CCGHR’s Zambia-Canada Research Partnership
- The creation of a new Cameroon-Canada Research Partnership
- The development of a new CCGHR Student and Young Professional Network, with goals of connecting students in Canada with students in LMICs
- The addition of the CCGHR’s University Advisory Council as a boundary partner in the project, supporting ongoing work to align the work of Canadian universities and create collaborative “Team Canada” approaches to country partnerships.

6.3 Capacity Building

The major outcome of the project is the capacity building that took place at multiple levels. Individually each team member developed unique skills for managing and coordinating virtual platforms. At an organizational level we have started to transform our daily practices based on our individual learning, resulting in improved capacity to serve our members and continue our work to create a thriving knowledge-sharing network. As a result of this success we have also started to receive more requests for services. This outcome has raised the issue of capacity and roles within the organization in terms of how much is manageable given our resources. This learning is currently being directed to work on the CCGHR’s 2015-2019 strategic plan to ensure clarity and continuity of this important issue.

6.4 Knowledge Creation

The project team of fourteen core members has embraced the use of Outcome Mapping as an approach to planning, building, and maintaining VPs. In doing so we have not only learned a great deal as individuals, but have also documented this learning at an organizational level. The created knowledge is applied to our work on a daily basis and we are doing our best to capture and share this knowledge broadly. Though we still face many challenges in supporting our network members and facilitating long-term goals of collaboration, we have received some excellent feedback on our chosen directions. We look forward to continued learning beyond the timeline of this project.

6.5 Use of Evaluation to Formalizing Learning into Organizational Structure

Using OM as a method for monitoring and evaluation helped the project team to develop an evaluation routine that ensured we built on our learning over the course of the project. This approach to sharing our learning will be continued beyond the VPL and will be incorporated into the organization within the CCGHR’s 2015-2019 strategic plan.
6.6 Information Sharing and Dissemination

The variety of outputs developed (see above) were shared with CCGHR members and with our broader networks via social media.

6.7 Training

Regular training sessions with our Connectors supported capacity building at an individual level as team members learned how to manage their specific platforms. Within our Secretariat we also facilitated (and continue to facilitate) regular training sessions so that our various platforms can be managed and updated by more than one person. The modules for online engagement currently being developed will be used by the CCGHR in the future to further train staff and members.

7.0 Overall Assessment and Reflections

At its core the CCGHR is a network of people who share a common commitment to global health research as a means of achieving better and more equitable health worldwide. The outcomes of this project would not have been possible without the work of the many partners who came together with a common goal of improving how we work together through the combined use of virtual platforms and social networking tools. Though the success of each platform varied with respect to achieving specific goals, we collectively learned a great deal about how to work with our partners in both Canada and LMICs. Our findings—captured in a forthcoming paper—will be incredibly useful to the many partnerships that the CCGHR already has as well as those that have yet to form. More importantly, other organizations and partnerships will be able to take this learning and apply it to their own unique contexts through the use of open access modules that will be available on the CCGHR website.

It is difficult to quantify the project’s specific contributions to development, though the improved communication and collaboration between partners and CCGHR members that has resulted, as well as the increased dissemination of resources and ideas via the CCGHR website and social media channels, will likely have a ripple effect on our broader network.

The most obvious contribution that the project will add to the work of international development organizations is the identification of the capacity needed to communicate and collaborate virtually at project, partnership, or organizational levels through the use of ubiquitous social networking tools. We know that the tools will continue to change, but the basic competencies that combine to form the capacity of a virtual knowledge organization won’t be changing anytime soon. By sharing this learning with other organizations we hope to help support broad capacity building by other virtual teams and organizations.
Given that the project was meant to be a laboratory for piloting a variety of ideas it is difficult to identify what we would do differently, as we were not expecting to succeed in all of the pilot approaches we took. However, as we continue to experiment with various approaches to this ever-changing landscape we will be very careful not to spread ourselves too thin and expand our work beyond our own organizational capacity. The initial project proposal included the use of five platforms, which expanded to seven, and eventually to ten. It has been a challenge to expand so quickly and some of the platforms have ended up stagnant as we simply don’t have the capacity to manage them all. This learning will be captured in the CCGHR’s 2015-2019 strategic plan to ensure that we are clear on our capacity when considering the creation of any new platforms. The capacity measurement tool we are developing will serve as a measuring stick.

Given the time and resources dedicated to the project we feel that we have been able to make a valuable contribution to this common challenge facing many international development organizations. We recommend that IDRC continue to support such initiatives and perhaps other organizations or projects funded by IDRC could make use of the tools we have developed as a result of the project. Though each project and partnership will be unique in terms of users, technology, and country context, an understanding the common issues we experienced during the VPL will be beneficial to any individuals considering how to efficiently and effectively use inexpensive and ubiquitous social networking tools to support international project teams and partnerships. As an increasing amount of work beyond international development is being done remotely, these lessons could also be useful to most anyone working on a global scale.
Vision, Mission, and Outcome Challenges

Vision

The CCGHR’s knowledge platform is the hub of a thriving knowledge—sharing network of global health researchers and knowledge users. The network is inclusive, equitable, and easily accessible. Network members connect with each other and share knowledge in efficient and innovative ways, resulting in improved communication and greater ties between the production and use of knowledge. Network connections support the ongoing development of South—North research collaborations, strengthen existing partnerships and lead to the cultivation of new ones. New knowledge is shared with its relevant users, who in turn incorporate this knowledge into policy and practice, ultimately contributing to improved health outcomes. These outcomes are, in turn, communicated throughout the network, best practices that encourage ongoing learning and capacity—strengthening at individual, institutional, and systems levels. As a result of this strategic online communication—both at the broader network level and within specific research groups—knowledge is managed and shared much more efficiently than in the past. The result is a thriving GHR network that supports new partnerships and collaborations, creating a community of producers and users working together to address the global health challenges of the day.

Mission

The Virtual Platform Laboratory (VPL) project is a catalyst transforming the CCGHR into a thriving knowledge—sharing network of global health researchers and knowledge users. The project strengthens the CCGHR’s current knowledge platform by developing and testing strategies and tools that promote better communication and knowledge sharing among users—and then actively diffuses these innovations and best practices among network members. Successful members actively use five different knowledge platforms on a routine basis to efficiently access and share information, and to develop dynamic new partnerships with other network members. Network members routinely circulate success stories of their resulting communications innovations, encouraging buy-in, adaptation and adoption by demonstrating how to better connect south—north research partners, strengthen existing partnerships, and cultivate new ones. Dissemination via traditional and social media platforms raises awareness of the project and the CCGHR among key audiences, creating greater stakeholder support, and diffusing network innovations among other knowledge users to encourage the development and use of similar knowledge platforms. All of this contributes to a dynamic, evolving, inclusive, equitable, easily accessible and innovation—diffusing network of global health researchers and knowledge users.
Canadian Coalition for Global Health Research
Virtual Platform Laboratory Project  CCGHR
Membership Outcome Challenge*

*Membership represents all members of the Canadian Coalition for Global Health Research. As the CCGHR’s virtual platform at www.ccghr.ca includes both open and closed aspects, some parts of this outcome challenge will also refer to visitors to the CCGHR virtual platform that are not members.

Outcome Challenge Statement

The project intends to see CCGHR Members contributing to and regularly accessing an inclusive, equitable, and easily accessible CCGHR knowledge platform that is the hub of a thriving knowledge-sharing network. The network is adaptive and responsive, ensuring that all members (especially those from LMICs) are able to both access and contribute to the network. Members know about existing resources and are regularly informed as new resources are produced, using this knowledge to build capacity at individual, institutional, and systems levels. Beyond membership benefits of a member database and funding/job opportunities, all resources will be open access. Members who are knowledge producers actively contribute knowledge to a growing database of information that is efficiently shared and widely promoted, contributing to capacity-strengthening more broadly while also benefiting the career development of individual researchers and working groups. Seeing the benefits of knowledge-sharing through the Coalition, an increasing number of network members actively contribute to and participate in CCGHR-facilitated research activities. These activities are oriented towards a larger Coalition-led dialogue about Canada’s role in global health research that encourages a broad range of viewpoints while focusing the Canadian GHR community on advocating for policy change related to central issues of common concern.

5 Deep Outcomes

1. Trusted Voice: The Coalition is a looked to as a trusted voice that guides a national (and international) dialogue on Canada’s role in global health research, providing access to relevant information while facilitating inclusive discussion that fills an existing void and advocates for the Canadian global health research community on a few central issues of common concern each year.

2. Equitable & Inclusive LMIC Access: CCGHR members from LMICs easily access knowledge about global health research on a regular basis, while also contributing knowledge to existing CCGHR working groups to further develop best practices for research partnership development.

1 This goal also stands for those accessing the open and public aspects of the CCGHR’s virtual platform.
3. Resources Shared & Promoted: Existing CCGHR resources are open access. Resources are well-known and well-used both by CCGHR members and by broader knowledge producers and users, resulting in capacity-strengthening at individual, institutional, and systems levels.

4. Program Awareness: The CCGHR’s program work is known about by CCGHR members and the general public, with knowledge regularly contributed to the CCGHR by working groups shared widely within membership and more broadly, as more members actively join and participate in CCGHR-facilitated research activities.

5. Incentives for Knowledge-Sharing: Research created by CCGHR knowledge producers is efficiently shared with CCGHR members and the broader public through an incentive system that both contributes to capacity-strengthening more broadly while also benefiting the career development of individual researchers and working groups.

6. Harmonized Advocacy for Policy Change: Contributing to and learning from a dialogue focused on GHR issues of common concern, members are aligned to better advocate for policy change at institutional, national, and international levels.

EXPECT TO SEE (LAYING THE GROUNDWORK)

1. Development of a Member User Team
   a. Selection of members agreeing to review OCs and provide feedback over the course of 2014 to ensure we are on track.
   b. Members providing quarterly feedback to the project on how they are experiencing changes in www.ccghr.ca and the Member Services site

2. CCGHR leadership agreeing to respond to requests for support and action for the VPL project, including:
   a. Reviewing our Outcome Challenge and providing feedback
   b. Program leaders, institutional liaisons, and working groups agreeing to contribute one blog post per year reflecting on their program/institutions progress on building capacity in GHR and why that work is important.
   c. Leading by example (with the support of the VPL)

3. Begin an ongoing email conversation: Members responding to increased engagement from CCGHR emails.
   a. Members opening Coalition emails on a regular basis
   b. Members clicking on links provided in emails and social media to access program areas and resources online
   c. Members accessing the website more often than in the past
4. Members Easily Accessing Knowledge in New and Efficient Ways
   a. Members feeling comfortable accessing the website from multiple platforms and multiple countries
   b. Members accessing information easily in low-bandwidth settings and in multiple languages
   c. Members using tools developed by CCGHR to explore existing resources online (e.g. Guide to Resources on CCGHR.ca)
   d. Members following the CCGHR on social media platforms

5. Start the Connections: with other members at multiple levels of the organization.
   a. Learning about other members and exploring existing member database to see who is doing what and where (e.g. institutions, countries, field of work)
   b. Members following and joining Coalition-led dialogue regarding important topics in GHR (both via email and via the CCGHR website)
   c. Members contributing online blogs that examine global health research challenges and potential solutions from a diverse range of perspectives.

6. Members understanding benefits of contributing to and learning from the CCGHR community, including:
   a. Academic incentives & benefits
   b. Personal benefits
   c. Community benefits

LIKE TO SEE

7. Develop the connections: beyond a one-way CCGHR dominated dialogue
   a. Members adopting innovative knowledge translation techniques that spreads their research far beyond traditional circles, making knowledge especially accessible to LMIC colleagues.
   b. Members value social media as not only a knowledge-sharing tool, but as a two-way tool for dialogue—joining new social media platforms and using them to connect with each other beyond the scope of the CCGHR’s communications work
   c. Members commenting on online articles, responding to member emails on specific topics, and following up on common issues with each other
   d. Seeing value in a two-way dialogue, members contribute updates on their research for sharing with the network on a regular basis, knowing that they will get feedback

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2 This also applies to non-CCGHR members who want to engage with the CCGHR and learn about global health research.
LOVE TO SEE

8. Increased Collaboration & Partnerships with LMIC Members: LMIC members genuinely included as core network members, actively contributing to and using the network through adaptive methods developed by the VPL that facilitate inclusive, equitable, and easily accessible knowledge-sharing.
   a. Connecting with other members who share common interests
   b. Developing proposals

9. Capacity-Building: Members using knowledge shared via the CCGHR network to improve their own individual capacity as well as institutional and systems capacities.
   a. Institutional members hosting symposiums and workshops on relevant GHR issues, with results shared in a press release put to the broad membership for feedback and discussion.
   b. Members with shared interests collaborating on multidisciplinary research proposals that are strengthened by a Coalition capacity to support project development
   c. Individual members who know, embody, and teach an agreed-upon set of core competencies of global health research (Suggested to include: knowledge translation, partnership development, cultural (contextual) awareness, and ethics)
   d. An informal “pay it forward” mentorship program embodied within the Coalition’s organizational culture

10. Influence the Global Health Research Agenda
   a. Reduce fragmentation of global health research activities, approaches and ideologies through strong Canadian networks
   b. A network of global health researchers that continues to develop and implement novel inter-disciplinary research approaches based on systems thinking in order to address complex global health problems
   c. A thriving network of global health researchers that has the ability to articulate the unique value and requirements of global health research into:
      i. Academic institution strategic plans
      ii. Local, national and international funding structures
      iii. Global Health Policy
Appendix 1 - Mission, Vision, and Outcome Challenges

Canadian Coalition for Global Health Research
Virtual Platform Laboratory (VPL) project:
Outcome Challenge and Progress Markers for
Coalition Members* at McMaster University

*Members are defined as faculty, graduate students, and undergraduate students that are working and/or studying at McMaster University.

By October 2014, the project intends to see Coalition members at McMaster make regular use of a (new) dedicated web-based work space (or “knowledge platform”) that will lead to enhanced information sharing, more efficient coordination of effort, and mutually-beneficial collaborative activities among members. Supported by a “knowledge broker” team, and reinforced at regular face-to-face workshops and other events, this knowledge platform will facilitate the achievement of the longer-term goals of the CCGHR-McMaster Liaison Team, which are: speaking with a unified voice (advocacy) for global health research (GHR) at McMaster, mentorship & individual professional development (learning) of members, and effective harmonization between GHR activities at McMaster and CCGHR goals and strategies. As a result, McMaster will be seen as a visionary GHR institution, using strengthened capacities (at both individual and institutional levels) to perform cutting-edge multidisciplinary GHR and to influence the wider development of GHR in Canada (through UAC linkages with other Canadian institutions).

Advocacy/Unified Voice: Aligned with the UAC’s focus on examining university strategies towards internationalization and transdisciplinary research/education, the network will critically reflect on McMaster’s current capacity for GHR and advocate for (and influence) changes that will strengthen institutional capacity to support equitable global health research projects, partnerships, and collaborations. This increased capacity will result in global health researchers and students who are better able to articulate the unique value of, and requirements for, global health research during the development of: individual research projects; institutional (i.e. multidisciplinary) research projects; institutional strategic plans; regional, provincial, national and international funding structures; and global health policies. Strong advocacy from Coalition members at McMaster will assist in efforts to reduce fragmentation of knowledge and research, and promote the value of global health research.

Mentorship/Learning: A balance of routine online knowledge-sharing about new research, events, and programs in GHR at McMaster (and beyond) and face-to-face workshops and symposia will facilitate shared learning and communication about the work of members, acknowledging that different members will meet and contribute to Coalition goals in different ways (e.g. undergraduates, graduates, and faculty each have different goals in developing capacity). A “pay it forward” model of mentorship will see faculty, graduate students, and undergraduates sharing knowledge Connecting people, ideas, and expertise, this ongoing campus-wide transdisciplinary dialogue on GHR leads to increased individual professional development (learning) for members while simultaneously strengthening relationships between faculty, graduate students, and undergraduate students at McMaster, fostering the development of innovative, collaborative, multidisciplinary, south-north research partnerships and projects. Mentorship and networking, both faculty to student and student to student will serve to: improve access to information, generate new linkages for innovative research projects and harmonize global health initiatives.

Alignment/Harmonization: The project will see Coalition members at McMaster (students or faculty) actively contribute to a thriving GHR community at McMaster fully aligned with the goals and strategies of the CCGHR. A focus on the annual themes identified by the CCGHR’s University Advisory Council (UAC) will guide conversation on important individual and institutional capacity-building issues in GHR. The sharing of member knowledge (e.g. publications, concept notes, policy briefs) in an open access database (promoted via the Coalition’s growing communications network) will spread both knowledge and conversation to other users and producers far beyond McMaster’s borders, increase information sharing and reduce fragmentation through the development of innovative research projects that break down disciplinary and institutional silos.
EXPECT TO SEE

1. **Development of a User Team**: A user team of members (both faculty and students) asking all members to agree to use and contribute to the trial workspace for the next 12 months.

2. **McMaster Liaison team members agreeing to respond to requests for support and action for VPL project**, including:
   a. reviewing our Outcome Challenge and providing feedback
   b. contributing content in the form of profiles, blog posts linked to current issues in GHR (both at McMaster and beyond) as identified in outcome challenge, and other potential requests
   c. taking visible leadership over the course of the VPL

3. **Design the workspace**: to facilitate discussion of current global health research challenges at McMaster and link members with each other.
   a. Members access the workspace on a regular basis.
   b. Members submitting their bio information to the McMaster member page (or to a student assistant)
   c. Foster sustained communication through continued input on the workspace.
   d. Share information about projects and GHR program links/information with the connector to upload onto the workspace.
   e. Brainstorm utilization of current or development of new online collaborative methods.

4. **Start the Connections**: Begin an ongoing email conversation between members on goals as outlined in the outcome challenge statement.
   a. Develop online blogs that examine GHR challenges and potential solutions at McMaster
   b. Members responding to thought-provoking emails addressing these issues.

5. **Gathering of Data for Open Access**: Members agreeing to contribute their research and research stories to a new institutional repository for global health research at McMaster.
   a. Research gathered is shared with the network and compiled via links on McMaster’s VPL.
   b. Research stories in the form of blog posts and/or videos are also included in the growing database.

6. **Members understanding benefits of contributing to and learning from the CCGHR community**, including:
   a. Academic incentives & benefits
   b. Personal benefits
   c. Community benefits

LIKE TO SEE

7. **Develop the Connections**:
   a. Official acknowledgement of McMaster’s membership with the CCGHR via a discussion of expectations from both CCGHR and McMaster in this relationship, obtaining legitimacy and buy-in for our work.
   b. Alignment of VPL work with work of McMaster’s Global Health Office
   c. Members attending a Spring 2014 workshop on the proposed outcomes of the network and how to get there. Discussion to focus on key issues of: GHR Capacity at McMaster, Mentorship, & Alignment/Harmonization. As an outcome, key Stakeholders/Influencers involved in GHR at McMaster taking leadership roles in advocacy sub-committees on each of the three major issues.
   d. Developing a mentality of a “pay it forward” model of mentorship where members acknowledge their role in capacity building of colleagues and students (e.g. where a junior faculty member is mentored by a senior member and also mentors a graduate student who then mentors an undergraduate student --- informally or formally).

8. **Generate and disseminate global health advocacy documents**: on key challenges facing GHR at McMaster: Internationalization, Interdisciplinary Research, Mentorship, Alignment
   a. Members and non-members (including identified McMaster leadership) attending and contributing to a Fall 2014 workshop at McMaster to reflect on the documents and make policy recommendations.
b. GHR recognized and supported more broadly by McMaster leaders with influence.
   (NOTE: We need to define this in more detail)

LOVE TO SEE

9. **Create a true sense of community of GHR at McMaster, including:**
   a. A formal “pay it forward” mentorship program
   b.

10. **Influence the GHR agenda at McMaster:**
   a. Reduce fragmentation of global health research activities, approaches and ideologies through a strong campus-wide networks.
   b. Create a network of global health researchers at McMaster that develops and implements novel inter-disciplinary research approaches based on systems thinking in order to address complex global health problems.
   c. Create a network of global health researchers at McMaster that has the ability to articulate the unique value and requirements of global health research into:
      i. Academic institution strategic plans
      ii. Local, national and international funding structures
      iii. Global Health Policy
ZamCan Team Vision

The long-term vision of the ZamCan Team is to improve the health of Zambians by strengthening the national health research system. This will be done by:

1. Strengthening the health research capacities of both Zambians and Canadian partners at the individual, institutional and “systems” levels, and;
2. Increasing the production and use of health knowledge (research) through Zambia-Canada partnerships.

ZamCan Team “Outcome Challenge”

This project intends to see members of the CCGHR’s Zambia-Canada Research Partnership develop a strategy that solidifies the vision of the ZamCan team. In doing so, team members respect and acknowledge the differences in communications norms in both Canada and Zambia, adopting new approaches to communicating that ensure all team members are included in important team dialogues and get relevant updates. The adoption of new and innovative approaches to sharing knowledge and working together will reflect the ZamCan team vision of strengthening health research capacities of both Zambians and Canadian partners at the individual, institutional and “system” levels.

“Deep Outcomes” from the ZamCan Team Workspace

1. Zam-Can team members feel ownership over a long-term Zam-Can strategy (having had everyone involved in/invited to the process)
2. Zambian colleagues are more directly involved in ongoing work of the Zam-Can team through deeper involvement in specific team activities. All team members feel the mutual benefit of the partnership
3. Individual team members in Canada adapt their own communications routines to better connect with team members in Zambia
4. Team members as a whole adapt their communications routines over the course of 2014 as recommended by the newly formed Communications Team

5. Canadian team members are motivated to contribute to projects and activities that go beyond the scope of their own individual projects, and that harmonize with the identified needs of Zambian team members (projects plus)

**Progress Markers**

<table>
<thead>
<tr>
<th>EXPECT TO SEE ZamCan Team Members</th>
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<tbody>
<tr>
<td>1 Agree to use the trial work space</td>
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<tr>
<td>2 Submit their bio information to the Team Member page</td>
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<tr>
<td>3 Sign up for project updates</td>
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<tr>
<td>4 Submit project information to the dossier</td>
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</tbody>
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<table>
<thead>
<tr>
<th>LIKE TO SEE ZamCan Team Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Viewing and absorbing material from the site regularly (biweekly or monthly) when prompted by email updates</td>
</tr>
<tr>
<td>2 Responding to team emails regarding progress of the work space when relevant</td>
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<tr>
<td>3 Providing input and feedback to the project as the workspace develops through various mechanisms established by the Communications Team. This includes:</td>
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<tr>
<td>a) Providing feedback by responding to the Team Survey and/or verbally through the Communications Team</td>
</tr>
<tr>
<td>b) Voluntarily sharing information with the connector to upload onto the workspace whenever relevant news items arise (i.e. information regarding grants, trips, collaborations, publications, events, employment opportunities) without being prompted by emails.</td>
</tr>
<tr>
<td>c) Contributing feedback and input to any Team documents disseminated for review</td>
</tr>
<tr>
<td>4 Heightened awareness of colleagues and the work that colleagues are engaged in, as demonstrated by meeting with colleagues during visits to Zambia and Canada, and connecting colleagues and students who share interests with fellow Team members.</td>
</tr>
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### Appendix 1 - Mission, Vision, and Outcome Challenges

<table>
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<tr>
<th></th>
<th>Description</th>
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<tbody>
<tr>
<td>5</td>
<td>Increased sensitivity and adaptation to different methods of communication that are accessible to Zambian and Canadian team members.</td>
</tr>
<tr>
<td>6</td>
<td>Using the workspace site as a “go to” spot for accessing relevant Team documents and materials (ex. Team reports and Bulletin archives)</td>
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**LOVE TO SEE Work Space X Members**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Collaborating with each other beyond the work space dialogue, as indicated by: new research collaborations, cross-citations, co-authoring publications.</td>
</tr>
<tr>
<td>2</td>
<td>Promoting the work space as a useful tool for communications with others beyond the scope of the project</td>
</tr>
<tr>
<td>3</td>
<td>Heightened sensitivity and responsiveness to different cultural communication styles, developed by continual feedback and indicated in Team communications strategies.</td>
</tr>
<tr>
<td>4</td>
<td>Strong sense of ownership and equal participation from Zambian and Canadian colleagues.</td>
</tr>
</tbody>
</table>
Canadian Coalition for Global Health Research

Virtual Platform Laboratory Outcome

Challenge and Progress Markers CCGHR

Student* Network

November 2013

*Students are defined as undergraduate (including medical, dentistry, pharmacy and veterinary) and graduate (both Master and PhD level) attending any institution within Canada or globally who are members of the CCGHR.

Outcome Challenge

Mentorship: Student network intends to facilitate mentorship: (a) within institutions, (b) provincially, (c) nationally and (d) globally (especially north–south connections). Not only will students better know each other, but will also be better connected to CCGHR members and leadership to facilitate mentorship opportunities through utilization of a web–based work space (or “knowledge platform”) and face–to–face workshops and events. Mentorship and networking, both faculty to student and student to student will serve to: improve access to information, generate new linkages for innovative research projects and harmonize global health initiatives.

Advocacy: The student network intends to provide a platform for inter–disciplinary critical reflection on the challenges of current approaches for students engaging in global health research. This will create a cadre of global health student activists who will be able to articulate the unique value propositions and requirements for global health research during the development of: (a) academic institution strategic plans, (b) regional, provincial, national and international funding structures and (c) global health policies. Strong student advocacy will assist in efforts to reduce fragmentation and put forth a solid value proposition for global health research.

Transformation: The network’s reach will extend beyond Canada to connect students, faculty and other global health sectors (non–governmental and policy) around the globe to increase information sharing and reduce fragmentation through the development of innovative research projects that break down discipline and country level silos. Students who are active members of the network will be well positioned to advocate for appropriate global health structural, funding and policy changes.
Progress Markers

EXPECT TO SEE (LAYING THE GROUNDWORK)

1. Development of a student network user team:
   a. Agree to use the trial workspace
   b. Submit their bio information to the team member page
   c. Sign up for project updates

2. **Identify current challenges:** Respond to the team survey or provide verbal feedback to connector.
   a. Identify current networking, methodological and ideological challenges for students currently engaging in global health research.

3. **Begin an ongoing email conversation:** between students on the workspace design and content.
   a. Discussions on the advocacy components of the network include: salient global health research challenges and methods or approaches.
   b. Agree on long-term expectations of themselves and of CCGHR leadership.

4. **Design the workspace:** to facilitate discussion of current global health approaches and ideologies and link students with each other and potential mentors.
   a. Access the workspace on a regular basis.
   b. Foster sustained communication through continued input on the workspace.
   c. Share information with the connector to upload onto the workspace
   d. Brainstorm the utilization of current or development of new online collaborative methods.

5. **Start the connections:** with other students in the network and with other local, national and global CCGHR leaders and members.
   a. Develop online blogs that examine global health research challenges and potential solutions from the perspective of students and engage faculty/policy/NGO perspectives.
   b. Link students with global health mentors from Canada and around the globe. This includes connecting and collaborating with the Canadian Society for International Health (CSIH) MentorNet Program.
LIKE TO SEE (ADVOCACY FOR CHANGE)

6. Develop the connections: beyond the support and scope of the workspace
   a. Creating CCGHR student chapters at member institutions.
   b. Developing and implementing a “pay it forward” model of mentorship where senior students (i.e. Masters or PhD) mentor more junior students (i.e. undergraduate).
   c. Creating institutional/provincial and national level maps on current global health activities that students can engage in.

7. Generate and disseminate global health advocacy documents: on key challenges facing the next generation of global health researchers.
   a. Advocacy meetings and the generated documents can be targeted at the institutional, national and international level depending on the scope of the issue and funding limitations.
   b. Example: one-day student lead workshop before the 2014 Canadian Conference on Global Health to discuss “how to not reinvent the wheel” – the critical role of networks and interdisciplinary collaboration in global health research.

LOVE TO SEE (TRANSFORMATION)

8. Influence the Global Health Research Agenda:
   a. Reduce fragmentation of global health research activities, approaches and ideologies through strong global networks.
   b. Create a network of global health researchers that develops and implements novel inter-disciplinary research approaches based on systems thinking in order to address complex global health problems.
   c. Create a network of global health researchers that has the ability to articulate the unique value and requirements of global health research into:
      i. Academic institution strategic plans
      ii. Local, national and international funding structures
      iii. Global Health Policy
Appendix 1 - Mission, Vision, and Outcome Challenges

Version 4 (21 Nov’13)

Canadian Coalition for Global Health Research
Virtual Platform Laboratory (VLP) project:
Outcome Challenge and Progress Markers for
University Advisory Council (UAC)

Outcome Challenge
By October 2014, the project intends to see **CCGHR Institutional Members (also known as the “University Advisory Council”)** make regular use of a (new) dedicated web-based work space (or “knowledge platform”) that will lead to enhanced information sharing, more efficient coordination of effort, and mutually-beneficial collaborative activities among member institutions. Supported by a “knowledge broker” team, and reinforced at regular face-to-face workshops and other events, this knowledge platform will facilitate the achievement of the longer-term goals of the UAC, which are: speaking with a unified voice (advocacy) for global health research (GHR) in Canada, mentorship for GHR, and effective harmonization across institutional projects (for example, collaborating in LMICs where member universities have projects).

Progress Markers:

**We expect to see CCGHR institutional members:**

| 1 | Identify one or more institutional liaison persons (LPs) who will agree to use and contribute to the trial work space for the next 12 months |
| 2 | Encourage LPs to submit their individual bio’s (profiles) to the site |
| 3 | Ensure that the website link (“bubble”) for their own institutional centre or hub on the CCGHR website’s map of Canada is appropriate and up-to-date. |

**We would like to see CCGHR Institutional Members:**

| 4 | Create an institutional “liaison team” made up individual CCGHR members (both faculty and students), with this team serving as a bridge between GHR activities at the university and the resources and links of the Coalition itself. |
| 5 | Participate actively in the 2014 UAC work plan. |
| 6 | Contribute blog articles and stories to the website about relevant issues |
| 7 | Conduct an assessment of the institution’s capacity to support and conduct GHR, summarize this in a profile, and put this profile on the UAC website, inviting comments from other institutions. |
| 8 | Be informed about the activities of the CCGHR student sub-network and facilitate mutually useful actions. |
| 9 | Making use of CCGHR’s national social media platforms to promote the work at individual member institutions. |

**We would love to see CCGHR Institutional Members:**

| 10 | Collaborate with each other beyond the workspace dialogue – on specific joint initiatives (including funded projects). |
| 11 | Demonstrate “harmonization” activities, such as collaborating with other Canadian universities (and their partners) working in the same LMIC. |
| 12 | Contribute to the shaping of the Coalition’s next overall strategic plan, and identifying opportunities to contribute to its implementation, such as participation in specific project teams and working groups. |
Appendix 1 - Mission, Vision, and Outcome Challenges

Canadian Coalition for Global Health Research
Virtual Platform Laboratory Outcome Challenge and Progress Markers CCGHR
Mining and Health Working Group

Outcome Challenge

The project intends to see members of the CCGHR’s Mining and Health Working Group use the existing work space to catalyze discussion on the goals and objectives of the group in the long-run. Working group members work together to define the role of the work space in relation to these goals, identifying the appropriate resources and information to be shared. Having agreed upon goals and structure of the group, members also contribute to the development of a long-term communications strategy that incorporates general information sharing and more specific project-focused communication. Updates sent to team members on a monthly basis allow for a steady flow of information without being overwhelming, leading members to access the work space on a regular basis to find out what others are doing, to brainstorm ideas, and to learn about new resources. The result is a strengthened network that promotes individual capacity-building through mutual learning. Shared learning between group members ultimately results in collaborative work on grant applications and research projects, thereby increasing the quality and quantity/rate/speed of work being done. The long-term outcome of this work sees a thriving research hub that influences policy-making and is seen as a trusted Canadian voice on mining and health research.

Progress Markers

EXPECT TO SEE Mining and Health Working Group Members

1. Agreeing to use the trial work space
2. Confirming their desire to continue as a working group (determining who of current colleagues would like to use the work space and agrees to have profile on work space site)
3. Providing feedback on goals of the group, to define the role of the work space and what content would be included

LIKE TO SEE Mining and Health Working Group Members

4. Clarify their expectations for group participation and agree upon goals of the group.
5. Providing content to share on agreed-upon work space pages (e.g. documents, websites, etc.)
6. Creating a systematic communications plan for long-term group functioning
7. Having a dialogue on the long-term potential of the working group to be useful, discussing to what end we are working and what the group’s aims are, feeling that their voices/opinions are being heard
8. Providing updates to the connector about their own work, to be shared broadly with the working group
9. Agreeing upon a comfortable amount of updates that ensure colleagues are kept up to date but also don’t feel that their time/energy is wasted with constant emails
10. Sharing information and brainstorming with each other spontaneously
Appendix 1 - Mission, Vision, and Outcome Challenges

11 Developing a protocol for sharing information/questions and asking for member feedback, promoting online dialogue

12 Using the work space because they see a mutually-beneficial value in it contributing to their research work

13 Valuing the working group to the point that they invite others to join and contribute

LOVE TO SEE Mining and Health Working Group Members

13 As a result of being part of a respected international research group, being invited to participate in important policy-shaping forums and discussions, both in Canada and abroad

14 Working together on specific projects or activities (e.g. a joint funding proposal that seeks input from group members) that influence policy at local, national, and international levels

15 Looked to as a resource for Canadian and LMIC stakeholders (researchers, policy-makers, community groups, etc.) who are hoping to build and/or strengthen individual, institutional, and systems capacity in the area of mining and health research
Appendix 2 - VPL Monthly Monitoring and Evaluation Questionnaire

VPL M & E Survey

Which working group are you reporting on?

Description of Change:
Please list any changes in boundary partner behaviour during the month of July. Note any specific progress markers that were achieved and note the level of achievement as Low (0-40%), Medium (41-80%), or High (81-100%).

Contributing Factors and Actors:
To the best of your knowledge, please note what contributed to the outcomes achieved in your "Description of Change" above. If speaking about more than one progress marker, please use the following approach to separate comments:

PM 1: Details of change here.
PM 2: Details of change here...etc.

Sources of Evidence:
Please mention any sources of evidence related to the change(s) described above. Feel free to send any outputs referenced to Dave to be added to the Dropbox.

Type here
Appendix 2 - VPL Monthly Monitoring and Evaluation Questionnaire

Unanticipated Change:
Please note any changes that came as a surprise to you.

Type here

Lessons / Required Program Changes / Reactions:
Please note any lessons learned or suggestions for changes to the project based on this learning. Any other thoughts or reactions are also welcome.

Type here

Challenges and/or Successes for Discussion?
Are there any particular challenges that you are facing and/or successes you have had that you would like to share with the team during our next teleconference call?

Type here
Appendix 3 – Phase 1 Outputs

VPL Project and Boundary Partner Visualization
In July 2013 the Canadian Coalition for Global Health Research (CCGHR) launched a new “Virtual Platform Laboratory” (VPL) project, seeking to create an online “laboratory” that will develop and test strategies to enhance and strengthen on-line communication activities of the Coalition. This historical scan of the Coalition’s past networking and communications work has been completed to help in the planning phase of the project to encourage reflection on where the organization is coming from, where it currently stands, and where it hopes to go with the VPL project.

Introduction

For globally-oriented organizations such as the CCGHR, network-building and communication come hand-in-hand. Successful network-building relies on well-executed strategic communications to network members, and communications strategies in turn rely on multiple channels and broad networks to share an organization’s message. In a 21st Century that has been defined technologically by a global communications revolution, this reality is ever more apparent. Though new tools allow us to be more interconnected on a global scale than ever before, the infiltration of multiple modes of communications technology into our daily lives has ushered in an era of information overload. For global health researchers, this new era has been both a blessing and a curse. In one respect, tools such as Skype, Dropbox, and email allow colleagues to share information and communicate with each other from almost anywhere in the world. On the other hand, the “email curse” of an overloaded inbox and general information excess that exists in all facets of life means that there is often more disconnect and miscommunication than ever before. Formed in 2003 during the nascent stages of the so-called Age of Information, the CCGHR’s founders were keenly aware that communications would be a central strategy in creating and fostering a thriving global network of researchers. This awareness is reflected in a variety of strategic networking and communications documents developed over the CCGHR’s short history. As described below, the CCGHR has routinely acknowledged the need for a web-based knowledge platform, though it is only recently that more direct efforts to transform a static website into a thriving knowledge hub have taken shape. After reviewing this history, a discussion of the CCGHR’s more recent focus on the potential of social media and knowledge platforms to serve network

1 This historical scan was created by Dave Heidebrecht with input from Roberta Lloyd, Sandy Campbell, and Vic Neufeld.
members will flow into some formal recommendations and considerations as the Coalition goes forward with the VPL project.

Early Years: 2003–2009

2005–2007 Strategic Plan (SP1)

Founded in October 2003, the CCGHR’s first Strategic Plan (SP1) was created to guide progress of the organization from 2005–2007. According to this SP, the CCGHR’s founding mandate was to promote “better and more equitable health worldwide”. Knowledge translation (KT) would play a central role. Accordingly, the CCGHR’s website was noted as a potential communications and dialogue tool that would support the following:

- Knowledge Sharing: Providing web-based resources and materials to membership.
- Communications: Using the website for “communication and dialogue.”
- Collaboration: Building the Coalition website to become “an innovative communication, learning, and “collaborative workspace” resource.

Using an online presence and tools to help build and support a growing global network has been a part of the CCGHR’s plans from the beginning.

2007–2009 Strategic Plan (SP2)

In a similar fashion to SP1, the CCGHR’s second Strategic Plan (SP2) was created to cover a three–year time period from 2007–2009. Retaining a focus on building the global health research (GHR) community, the plan once again includes a KT focus, reinforcing the goals of the CCGHR to deliver people, services, products, and networks. Reflecting the formative focus of the organization’s development, SP2 focuses largely on the role of knowledge as a “driver” for good health, and at times notes the need for continued development of the CCGHR website to serve this goal. Specifically, SP2 notes that this development has seen the increasing use of password–protected work spaces by various CCGHR task groups, while exchange among a growing membership has been encouraged via online member profiles. The plan also makes note of the need to expand an online “resource library” to build research capacity. Reflecting upon how these developments have contributed to the functioning of the organization, SP2 notes that the work space aspect of the website “could be used much more extensively (and creatively) by other Coalition groups.” Overall, SP2 notes some progress in use of the
CCGHR website to connect members, but also acknowledges that much work is still needed.

Though SP1 and SP2 include various acknowledgements of the need for the CCGHR to have a strong online presence, neither plan is explicit in addressing how such a space might be developed. SP1 identifies the need for a site to help the CCGHR reach its goals, while SP2 outlines some of the early attempts to build an interactive site that not only provides information (like any traditional website), but encourages and supports more direct dialogue between network members. This transition reflects a realization of the need for the CCGHR’s online engagement efforts to evolve from a static one-way approach to a dynamic two-way communications platform. Pausing to reflect on these founding documents provides valuable insights into the early years of the CCGHR’s online engagement work.

Beyond 2009: A Greater Focus on Online Engagement

In reviewing the achievements during the execution of SP1 and SP2, online engagement was not a major focal point of the Coalition’s work. More recent documents developed between 2009 and 2013 start to acknowledge the central importance of the CCGHR website and an online communications strategy as contributors to the CCGHR’s larger goals. To help in the development of the CCGHR’s 2010–2014 Strategic Plan, both an Online Social Network Concept Note and a Strengthening the Network Concept Note Communications Plan were developed during 2009. A Communications Plan was also drafted in 2011. Each of these documents acknowledged the increasing role of the CCGHR website in overall organizational strategy. ²

2010–2014 Strategic Plan (SP3)

As of writing, the CCGHR’s 2010–2014 Strategic Plan (SP3) continues to guide the CCGHR’s communications and network-building efforts. A major piece of SP3 is the CCGHR’s continued vision to support a “vibrant global health research community” by encouraging the type of two-way communication that can connect researchers and knowledge users. Acknowledging that there are disincentives to knowledge sharing, brokering, networking, and coordination built into GHR culture, the Vision section of SP3 notes:

“Within Canada, we envision a connected and vibrant global health

² Both of these documents, as well as SP’s 1,2, and 3 are available in the VPL Team Dropbox under Learning Centre Resources --> CCGHR General Resources --> SP Annexes.
research community in which members network, plan, produce, evaluate, exchange, and champion policy-relevant and equity-sensitive research and knowledge. Through an increased attention to knowledge translation, resource mobilization and communications, the Coalition envisions a strengthened Canadian global health research community that is better funded, routinely exchanges knowledge, builds upon this robust knowledge base, enjoys strong political and institutional support, fosters new leaders, and develops powerful, sustainable and equitable partnerships with like-minded individuals in LMICs, HICs, and in the “spaces connecting the two” (Emphasis added).

A focus on communications and partnership strengthening in the spaces that exist between researchers is thus a central focus of SP3, guided by values of equity, research, learning, sustainability, locally-owned initiatives, leadership for change, and gender. One of three strategic priorities is also “coordinating, brokering, facilitating and partnering among global, national and local researchers, institutions and systems.” This priority is reflected in each of the three program areas of focus in SP3: Capacity Development, Policy Influence, and Networking. The focus on networking and network building as a core CCGHR priority in SP3 is a major leap from earlier SPs with respect to the roles of communications and knowledge brokering in developing and strengthening the Coalition’s network. SP3 specifically notes that the network will be strengthened through the creation of “innovative knowledge management practices”:

“Using cutting-edge information and communications technology – such as the creation of an online social networking community – Coalition members will have new tools to exchange knowledge, contribute to the Coalition’s knowledge base, make new contacts, create new partnerships with likeminded individuals and institutions, and ultimately undertake and support more informed, policy-relevant research. The Coalition’s network will not only improve knowledge flows among its members, it will also work to create spaces and opportunities for policy influence, particularly through increased dialogue and deliberation among key research-users. The network will also connect the silos of the many different disciplines within and beyond health research through the active encouragement of multidisciplinary approaches.”

To support this work, SP3 proposes the creation of a communications strategy that would: a) help the CCGHR collect information on lessons learned and best-practices, to be disseminated widely and; b) develop incentives for CCGHR members to take part in communications and dissemination work. Overall, SP3 brings the CCGHR’s communications and online engagement strategy into focus as not only a supporting
mechanism, but a central pillar, to the work of the organization.

Strategic Documents: 2009–2011

Guided by SP3, recent years have seen a variety of communications-related documents developed, including the following:

**Strengthening the Network Concept Note (2009):** Reflects the goal of creating a self-organizing network that would require little direct CCGHR management and also inquires about lessons of online social networks.

**Online Social Networking Concept Note (2009):** Discusses whether online social networks (OSNs) can be useful to the CCGHR. Makes note of various approaches to social networks that are possible, including creation of: individual member pages, theme-focused groups, collaborative workspaces, and email updates. An OSN is proposed as an addition to the existing CCGHR website, while the use of Facebook and Twitter are also noted within as possible strategies for engagement. A weakness of this document in retrospect is a lack of understanding as to the amount of time needed to develop and manage OSNs. Overall though, the document provides some crucial insights into OSNs and also excellent suggestions for the CCGHR going forward, including: a) an internal discussion on appropriateness of OSNs for the CCGHR’s work; b) a survey of present members to get feedback on this idea, and; c) a formal “web strategy.”

**Communications Plan (2011):** Developed by the CCGHR’s Policy Influence Program (PIP) in response to the need for an overarching strategy to manage long-term communications, this plan remains near completion though has not been implemented as a guiding document for CCGHR work. Shared with membership though not implemented, aspects of the document that could be useful to future work include a focus on: tools and strategies, internal communications, messaging, channels, and evaluation and learning. A particular area of focus that could benefit future CCGHR work is “external communications”. An online social network and the CCGHR website are proposed within as key pillars of this strategy.

Though other guiding CCGHR documents make reference to online engagement, the 2009 OSN Concept Note and 2011 Communications Plan

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3 Tania Bubela was the main “engine” for the document, with inputs from Sandy Campbell & Vic Neufeld.
Plan are the most obvious documents to date that focus on online engagement. Looking back, these documents have helped to catalyze the most recent CCGHR online engagement history and should also serve as excellent sources of reference for future CCGHR work over the course of the VPL project.

2012 to Present: A New Chapter of Continued Learning

Building on some more detailed online engagement work done between 2009 and 2011, 2012 saw the CCGHR focus more strategically on how to build a successful online social network. Using existing tools on the CCGHR’s MemberLodge website as well as experimenting with a trial social networking site dedicated to CCGHR members, a major early lesson was learned. This lesson is that regardless of the type of “space” being used, a great deal of time and energy is required to develop and manage online network-building tools. Looking back on earlier CCGHR documents, this reality was not as fully understood until trial sites were developed and implemented with varying degrees of success.

Much of this learning was reinforced in February 2012, when CCGHR members Erin Hetherington and Leslie Chan attended a Learning Forum on virtual platforms hosted by the International Development Research Centre (IDRC). Bringing together development organizations that are all engaged in various levels of online engagement through interactive “virtual platforms” (VPs), the forum provided an opportunity to gain insights on best-practices and lessons learned in a shared learning environment. In a report back to CCGHR, Erin Hetherington noted some key lessons to keep in mind going forward, including:

**If You Build It, They Won’t (Necessarily) Come:** Many organizations have trouble engaging with users. VPs are quite “trendy” and there have been mixed results in terms of success.

**Expectations Should Be Reasonable:** Not everyone will engage at the same level. Purpose and benefit of engagement needs to be clear if high levels of use and participation are to occur. Participation rates often see 90% of users using content but not actively engaging, 9% engaging somewhat regularly, and 1% being very active and generating the majority of content and activity.

**Targeted Purpose:** There must be a reason for people to engage that shows the value in participating. Users must be persuaded of the value that they bring. Platforms need to target the right information to the right people.

**Ongoing Support and Facilitation is Key:** There must be a dedicated person to moderate engagement and to take leadership. This person must also be able to enable participants to use the
technology, regardless of technological skills or expertise. Being helpful and guiding people with different comfort levels is key.

**Incentives for Engagement:** People must be provided with a reason to participate. Incentives can vary and can be both online and offline. Featuring and profiling work of contributors can be beneficial.

**Measuring Impact is Difficult:** It is hard to know if your VP is successful. This is still a relatively nascent area of knowledge.

**Outsourcing:** Many technical functions can be outsourced.

In mid-2012, informed by this experience and the above recommendations, the CCGHR began to explore options for developing a functional virtual platform to better serve members who are spread across Canada and around the world. Though the CCGHR had already created a virtual platform on the organization’s existing website ([www.ccghr.ca](http://www.ccghr.ca)) in the form of a forum called MemberLodge, the platform had proven relatively unsuccessful in creating any sustained online engagement with CCGHR membership. Knowing that online engagement would be central to future CCGHR communications and collaboration efforts, the CCGHR used the remainder of 2012 to take some initial steps towards addressing the challenges associated with building an effective online knowledge hub. This work included:

- **An “Online Engagement Working Group”** that has done background research on virtual platforms and has taken initial steps towards planning for a “virtual platform laboratory.”

- **A CIHR-funded Harmonization Initiative** in the form of an online database ([www.ccghrharmonization.com](http://www.ccghrharmonization.com)) that is focused on encouraging Canadian global health researchers to better network and collaborate for a more harmonized and efficient Canadian response to health research needs in seven low-and-middle income countries (LMICs). Countries included in the database are Cameroon, Ethiopia, Honduras, Mongolia, Tanzania, Uganda, and Zambia.

- **A Membership Survey** to learn about online practices and suggestions for a future virtual platform. The survey received a 40% response rate, of which 1/3 has come from LMIC members.4

- **Three Pilot “Work Spaces”** to explore best practices for online collaboration using virtual platforms (two of which have active participants from LMICs).

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4 At the time of the survey, the CCGHR’s membership stood at about 500 individual members.
Two **Global Health Research Initiative (GHRI) Projects** (launched in early 2013) that incorporated virtual platforms.

Based on knowledge gained from these experiences, the CCGHR applied for an IDRC Canadian Partnerships Grant in January 2013. The project called for the creation of a “Virtual Platform Laboratory” (VPL) and was granted funding for 18 months in April 2013. Launched in July 2013, the project involves the creation of an online “laboratory” that will develop and test strategies to enhance and strengthen online communication activities of the Coalition. The VPL will test these strategies through the use of five unique “work spaces”, learning from pilot work spaces developed over the course of 2012 and 2013.

**Building on Existing Work Spaces**

Over the past year (July 2012–July 2013) the Online Engagement Working Group has overseen the development of five virtual platforms, each of which are unique in scale and scope. Culminating in the launch of a new CCGHR website in May 2013, the use of these platforms to date has been crucial in informing the Coalition’s strategy at the launch of the current VPL project. Work spaces include:

- **Harmonization**: An online database recently completed, and set to be publicly launched during the course of the VPL project.
- **Mining and Health**: Created to help plan an international meeting on the health impacts of mining.
- **McMaster University**: Responding to the recently formed concept of Institutional CCGHR members, this space provides an online platform to connect McMaster–CCGHR members.
- **Zambia–Canada Research Partnership**: Built to serve an existing research partnership, connecting group members in both Zambia and Canada.
- **Mentorship**: Used as a management space for an international research project on mentorship in GHR.

A new CCGHR website was also launched in May 2013. Building on experience gained from developing these work spaces, and triggered by the launch of a new project that involved online dialogue and engagement, the website integrates social media with a blog to create an interactive knowledge hub that will be used to disseminate current and future CCGHR work.

**Work Space Lessons Learned**
Over the course of one year, the CCGHR Online Engagement Working Group has learned a great deal about virtual platform development and management. Though the VPL project is meant to shed more light on this work, some key lessons learned so far are already informing plans for this next phase. They include:

**Connectors:** Work space managers, known as “connectors”, are central to the success of an online space, serving the role of moving things along, keeping group members up to date, and updating the work space. Connectors require both a specific skill set and the time required to manage a site in order to be effective. A major aspect of the VPL project will be to develop training resources for future connectors.

**Encouraging Feedback:** It is extremely important to have an open approach to communication as a work space develops so that colleagues feel welcome to provide input throughout.

**More Time, Better Engagement:** Online engagement through knowledge platforms is a tedious task, and as such, a dedicated manager with dedicated hours is required. The more time that can be put towards engagement, the better that engagement will be.

**Buy-in:** In order for a platform to be effective, there must be buy-in from those who are expected to use the platform. Explaining the benefits and expected results, and asking colleagues to contribute to the planning process can be helpful in this regard.

**Goal-setting:** In order to create an effective and functional platform, the group building the platform should have specific goals or outcomes that the platform will help enable.

**Leadership:** Given that platform managers are most often not in leadership positions within their group, those who are in leadership positions (as PIs or otherwise), must not only want to use a virtual platform to help work towards team success, but must also lead by example when it comes to engagement.

**Balance:** While online engagement can help to keep people connected, it is not a complete replacement for face-to-face meetings and other modes of communication.

These lessons are far from complete, yet can serve as a foundation from which the CCGHR can launch the current VPL project, continuing to learn, adapt, and adopt best practices going forward.

**Conclusion**

Since its inception in 2003, the CCGHR’s focus on using online knowledge platforms has grown alongside its development as an organization. Early on, the use of a website as a communications tool
was noted as important, and while a basic website was created, developing a more interactive platform was not a major focus. In recent years, however, as communications and network-building have come to increasingly rely on the use of ever-changing online tools, the CCGHR has realized that much more than a static website is needed in order to serve network members and work towards organizational goals. This awareness has grown in recent years, as efforts dedicated to understanding how social networking and communications strategies might be improved have led to a shift in focus at an organizational level. Most recently, this focus has seen the development of trial knowledge platforms built to serve distinct CCGHR groups. A broader online engagement strategy that aligns with the online engagement goals of the CCGHR’s 2010–2014 Strategic Plan continues to take shape. Work undertaken in the past year has already yielded a number of positive outcomes. Increased efficiency, better communication, and the ability to work better with colleagues across space serve as anecdotal evidence, though these outcomes are still difficult to effectively measure. Consequently, there is still much to be done in terms of further defining best practices, engaging with network members, and encouraging uptake of tools for widespread use by membership.

From the beginning, the communications goals of the CCGHR have been guided by the organization’s values, particularly equity and good partnerships. With this in mind, the CCGHR continues to explore how communication practices can be user-friendly to include LMIC colleagues in an equitable manner, as much as possible. These goals include not only building knowledge platforms that are easy to use, but also sharing information in English, French, and Spanish, an ongoing challenge in the face of funding constraints. The VPL project provides a unique opportunity to spend eighteen months (July 2013–December 2014) addressing these challenges while working towards sustainable solutions. Connecting with other like-minded groups and organizations facing similar realities over the course of the project will provide an opportunity to not only contribute to, but to also learn from, an important and ongoing dialogue about effective and equitable global health research communications. This document can serve as a reminder to project team members and future CCGHR employees as to where the CCGHR has come from while we all continue to work to improve through the next steps in this ongoing learning process.
This usability plan is an initial draft to help guide CCGHR Work Space development, and has been designed specifically for CCGHR Work Space Coordinators (AKA “Connectors”) as part of the CCGHR’s Virtual Platform Laboratory (VPL) project. The goal of the plan is to provide a strategic framework for taking the initial steps to online engagement with the target working group or institutional member chapter, providing guidance, ideas, and initial metrics to start tracking engagement. This plan will help guide you on initial steps to be taken while we put together a more detailed Online Learning Centre, and in the future will serve as a guide for new Connectors.

As this is a new learning experience for CCGHR leadership, Connectors, and CCGHR members, the goal is not to achieve immediate success, but to track what works and what doesn’t, while seeking to understand why. Through communication and collaboration across the CCGHR network, we hope that within 1-2 years, we will have developed a better understanding of exactly what type of engagement is desired by working groups, institutional members, CCGHR members, and the broader Canadian global health community.

GOALS:

Create **functional online work spaces** for communication, collaboration, and capacity-building that are useful to members and the public

Develop **CCGHR capacity** for management of online work spaces, including the **development of best practices guidelines**

Create a **working template** for future work spaces

Build the **CCGHR’s online presence**

Create a **CCGHR---wide platform for information sharing** with members and the general public

GETTING STARTED

*Wordpress: A Common Platform*

For the time being, Coalition CONNECT Work Spaces (e.g. Mining and Health CONNECT) are being hosted on the **Wordpress** hosting platform, a fairly simple blogging structure that has become gradually more popular as a **Content Management System** (CMS) for website management. The goal of using this tool is to build a simple yet effective work space that can be learned by a broad range of CCGHR members who may serve as Connectors. As Wordpres is an extremely
popular CMS system, there is a great pool of resources online that is constantly being updated. Simple Google searches will lead Connectors to video tutorials, blog posts, and forum discussions. While the VPL Learning Centre is available to help you with work space management, we encourage Connectors to use these resources to support your own learning.

You can access the Learning Centre online at: 
http://www.ccghrharmonization.com/connect/resource-centre/

The CCGHR’s YouTube page also has a small amount of instructional videos, which will grow over the course of the project:  
http://www.youtube.com/channel/UCM_D4CiO2ZRQfBVHA9FND6g

Learn more by searching for Wordpress online or at http://wordpress.org/

**The Work Space**

Though CCGHR work spaces will eventually come to develop their own content and style, we are currently developing a common structure that will serve as a template for new work spaces. This structure currently includes the following pages:

- **Homepage Blog**: The blog feed for each work space will serve as the landing page for visitors, and it is where they will see recent news or updates. This feed will eventually flow into a larger CCGHR blog feed to be developed by January 2015.
- **Directory**: A directory page noting team members (or CCGHR members) will provide visitors with more details on the people who make up the team or who work at the specific institution in question. This directory will include short bios and research information alongside contact information, to encourage interested parties to follow up while also connecting team members who are working together across space.
- **Resources**: This page will provide links to resources related to the group in question.
- **Outputs**: This page will provide outputs that have come from the group in question.
- **Events**: This page will provide information on upcoming events, including meetings and/or conferences, that involve the group in question.
- **Contact**: This page will provide contact information for the Connector of said group.

Beyond this basic structure, needs will be determined by the group in question, either through the project team (working group) or liaison team (institutional member).

**Training**
The CCGHR’s Virtual Platform Laboratory will help you with initial setup of your work space, and will provide you with appropriate training to manage and operate the day-to-day functions of the space. Along with an initial walkthrough, a basic toolkit will be provided to you that has information on the core functions and tools of the work space. Further information is also provided in the CCGHR’s Learning Centre. Initial documents will be developed in step with current Connectors as the VPL project develops.

BUILDING TOWARDS ENGAGEMENT

Once your work space has been built and you have had some initial training as to how to use it, it’s time to start populating the work space with information specific to your working group/institutional member space. The following steps are recommended, and will be adjusted as best practices are learned through the 2013-2014 VPL project:

1. Brainstorm with your project team/liaison team as to the important aspects of your work that the team believes should be shared in the work space. The CCGHR has developed a template survey that can be tweaked to your specific group. Feedback can help you determine the goals of your work space early on. Ensuring that your work space fits the needs of your team, and that individual members feel ownership of the space is crucial to long-term success.
2. Build new pages as needed (determined in Step 1), and complete initial written aspects of site deemed necessary before site launch.
3. Invite project team members to submit information via the Directory page. Identify 3–4 individuals in the group and ask them more directly to submit this information fairly quickly. Other members will see the results and hopefully follow suit, though at this time you may have to play the role of “Hound” and follow up directly with individual members to gather information.
4. Populate Directory with member information.
5. Start spreading word of the site launch prior to going public. This may help build some momentum for the launch and bring people to the work space.

INITIAL ENGAGEMENT: Site Launch and Coordination

Once these initial steps have been taken, it is time to launch the new work space. Whether a private space for a working group, or a public space for broader engagement, it is important to be prepared to consistently engage with the target audience of the work space. The following are key issues that should be kept in mind when starting to engage:
**Time Commitment:** While in our trial stages, time commitment to work spaces will vary, and we ask that you track the time you spend engaging on a weekly basis. This will help the OES Working Group to identify common strategies for coordination and management of work spaces in the future.

**Effectiveness:** What types of engagement are getting the best responses? Why? These are all questions that will be addressed over the course of the 2013-2014 VPL project, and more details on how to measure the answers to these questions will be provided over time.

**Feedback:** As we attempt to understand what works and what doesn’t, feedback from our colleagues will be crucial. Ensure that you maintain an open dialogue with team members, and remind them that during this learning process we want to hear from them.

**Group Goals:** The goals of each group will be determined by group members, and as such, the feedback and engagement process in early stages will focus largely on exploring the goals of the group and finding best practices for reaching such goals.

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**THE VPL TOOLSET: FINDING A BALANCE**

One crucial aspect of coordinating a Coalition work space will be finding the appropriate communications balance through the use of multiple tools. While the Coalition will develop a set of tools and best practices over time, it will take some time for Connectors to find a rhythm that works for the group in question. The following tools are a starting point for initial engagement, and more may be added or refined as the Coalition gains experience and capacity in online engagement:

**Email:** This common communication tool will still be used for much direct communication between Connectors and project teams/institutional membership, as it is still the central means of communication for Coalition members.

**Dropbox:** This file sharing program uses “cloud” technology to allow files to be stored and shared between colleagues working in distant locations. When installed, project folders are accessible on personal computers from anywhere that has an internet connection. Dropbox will be the standard file sharing program for Coalition projects. A Dropbox guide for Coalition members will be developed in 2013.

**Skype:** This common audio visual communications tool is suggested to be used as a primary connecting tool for Coalition projects. Project teams will determine how and when Skype calls will take place, though a guiding Skype document may also be developed in 2013 as determined by the Online Engagement Working Group.

**CONNECT Blog:** The homepage of each workspace will feature the most recent blog posts to come from the working group/institutional member page in question. Each work space blog will feature content as determined by project/liaison teams, and as such, goals of each blog may differ. Overall,
however, the common goals of connecting, communicating, and capacity building will guide blog development. As the OES moves forward, private blog spaces will likely develop to cater to specific project teams for internal communication and coordination, while public blogs will serve to inform visitors as to work being done by the group in question. More detailed work on management of these spaces will be done over the course of 2013 and 2014.

**Face-to-Face Meetings:** While online communication can better connect us when apart, in-person meetings are invaluable. Depending on the type of group you are managing, face-to-face meetings may be able to happen once every month, or may only happen once a year (or less).

Over the course of 2013 and 2014, this initial toolset will be tested by the VPL, using five trial spaces in order to develop more expertise on best practices. Upon completion of the project, a more detailed outline on an agreed-upon Coalition toolset for online engagement will be developed.

**CONNECT**

**What to blog about?**

Once your work space is set up and populated with an initial information base, it is time to start connecting members of your group via the blog tool. Initially, use of the blog will be experimental, as you’ll need to get feedback from your group as to what they find useful and in what dosage (i.e. how often, how much, etc.). Overall, the initial goal for yourself will be to find a comfortable routine for blog updates, as each group will have its own dynamic. The goal for the group will be to find what types of information sharing add value to the group’s work, and how project collaboration could benefit. This will be a difficult task at first, and will require a great deal of patience as various approaches are tested.

Some suggestions for initial engagement include:

1. **Private Working Group Blog** (The goal being to communicate internally):
   a. Sharing information on new pages/documents added to the work space and/or dropbox
   b. Reminding team members of upcoming deadlines and/or the project timeline from time to time
   c. Providing any news that would be relevant to the work of the group
   d. Alerting the group to a document that needs reviewing/editing
   e. Communicating about upcoming meetings
   f. Any other relevant information that group members may be interested in

2. **Public Working Group/Institutional Member Blog** (The goal being to communicate outside of the group):
   a. Sharing information on any recent developments related to the group
b. Sharing news related to the group

c. Sharing event information

d. Providing updates on group activities that will feed into the larger Coalition blog

e. Sharing news related to the topic that those visiting may be interested in

**Frequency**

As a rule of thumb, blog posts can be made anywhere from once per week to once per month. This may vary depending upon the work space, and another initial task of the Connector is to find a balance that works in this regard.

**FEEDBACK**

As Coalition work spaces are a completely new idea, we realize that some of our initial plans will change as we learn more about design, implementation, and management practices. We would like all Connectors to ensure that their respective working groups understand that the work currently being undertaken is a pilot, and as such, we want to hear from everyone involved. The following steps are suggestions to get you started, though a more detailed feedback strategy will be developed as we move forward.

1. As soon as the work space launches, tell your team about it, but also remind them that the work space is a pilot. Be sure to communicate this point, while making it clear that you want to hear ideas and are open to suggestions and constructive criticism.

2. Get some initial ideas as to the demands of your group by talking with some of the group leaders (project team or liaison team), to get their initial thoughts. This might include setting up one-on-one or group Skype sessions with colleagues to listen to their past experiences with online collaboration, listening to what has worked, what hasn’t, and what key challenges are perceived to exist from their perspective.

3. Listen. During these conversations, take notes that you can reflect on later, as some ideas may arise once you have had a number of conversations.

4. Communicate with other Connectors. As our pilot develops, sharing of experiences and challenges between Connectors will be important. Quarterly Skype sessions for Connectors will allow for such information sharing.

5. Use the blog to ask questions as you go. If you’re unsure of how things are going, use the blog space to put a question out to the group.

6. Survey. Getting members to complete very short anonymous surveys can be a way to get detailed feedback that you may not get through Skype or email conversations.
CONCLUSION: CONNECTORS AS KNOWLEDGE BROKERS

The Coalition is now taking the plunge into the exciting (yet challenging) world of online engagement, and we’re extremely happy to have you as part of our team! As this initiative moves forward, the importance of the Connector role in project management and communications will become more clear, and we hope that such a role will become a central aspect of enabling our colleagues to communicate, coordinate, and build capacity in a more efficient and effective manner. As such, we see Connectors as knowledge brokers. Listening to colleagues, filtering out important information, and repackaging that information into knowledge that can be quickly consumed by the target audience will be the central function of a Coalition Connector. While we are still defining exactly how this function will develop, we want you to keep in mind that there will be some growing pains, but that overall, the end result will be extremely helpful to the work of the Coalition in future years. We’d like to thank you for taking on this important task with us, and have a few thoughts for us all to keep in mind as we go forward.

1. The hardest part will be to get colleagues on board early. As you start to populate your site, keep this in mind, and remember that this entire process will take many months.
2. Be patient and stick with it despite frustrations with lack of initial response, etc.
3. Prepare for many opinions. Knowing that you’ll be seeking feedback on a topic that frustrates many of our colleagues, be prepared for many opinions on the right way to do things. Smile, listen, and don’t take any opinions personally.
4. Organization is coming. We realize that there could be many more “guiding” documents to help you as we go forward. We’re working on developing an online space for Connectors to share best practices and ideas, and with your help we hope to develop a strong set of tools over the course of the pilot.
5. While we’ve put these initial ideas into a working structure, everything is open for discussion and please feel free to provide suggestions, feedback, and constructive criticism as you see fit.
6. Thanks and keep up the great work!
As you and your project team, research group, or organization begin to consider how online communication can help you, we’ve put together a guide to help you take those most important first steps—getting started! The ideas below have been compiled through feedback from the 2012 IDRC Learning Forum on Virtual Platforms, insights from CARE Canada’s Mara O’Brien-James (Director, Organizational Effectiveness), and from experience gained through the CCGHR’s own online engagement efforts. While the best way to learn is through doing, the ideas shared below are meant to help to guide your efforts. Feedback on your own lessons learned is always welcome by emailing CCGHR Project Officer Dave Heidebrecht (dwheidebrecht [at] gmail.com):

**Put People First:** Remember that at the other end of the computer screen there is a person who your various tools are meant to serve. Don’t let putting the tool first get in the way of the people who are using the tools.

**People Learn Differently:** Remember that there are multiple styles of learning. This is especially true when considering the use of technology. Finding different ways to teach different users is extremely important. Be prepared to adapt your plans to suit different learning styles.

**If you build it, they won't (necessarily) come:** Even if you build the best knowledge platform with the newest tools and technology, it doesn’t mean your platform will get used. Be prepared to hold people’s hand and invite them to use the platform in a way that guides and encourages.

**Ongoing Support and Facilitation is Central:** Despite what many may think, knowledge platforms don’t operate themselves. Even though technology can help us, there needs to be a person dedicated to engagement on a regular basis.

**Infuse a Service Culture:** Any knowledge platform is essentially a service provided to better improve communications within your network. Knowing this, create a service culture that ensures people know how to use new tools, feel comfortable asking for help, and are responded to in a timely fashion.

**Expectations Should Be Reasonable:** Not everyone will engage on the same level, nor should they be expected to.

**Have a Targeted Purpose:** Why do you want to create a knowledge platform? This will be the first question any potential user asks, so you should think about this before doing anything. Your answer(s) will also help determine the type of platform you build.

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1 This guide was developed by Dave Heidebrecht based on inputs from Mara O’Brien-James (CARE Canada) and Erin Hetherington (CCGHR). It also incorporates learning shared at the IDRC’s 2012 Learning Forum on Virtual Platforms.
Communicate Your Intent: Let your users know why you have created the platform and how it will benefit them, the group, and/or the organization.

Use Simple Language and Avoid Jargon: Be clear about definitions by using simple language and avoid jargon wherever possible.

Make It Easy: Any tool that you are expecting new users to take up needs to be functional, reliable, and easy to use. Keep it simple.

Make it Regular: The more you can make communications a regular part of someone’s routine (without being annoying), the better chance they will eventually use it spontaneously.

Create Incentives: Find out how to make use of the platform a “win—win” situation. Promoting the work of users within your network is one possible approach.

Nurture Success: Much will be gained from trial and error experiences. Nurturing success where it is developing organically is crucial in achieving long—term success. Invest in the seeds that grow.

Measuring Impact is Difficult: Though we do have some tools to measure specific metrics, it is difficult to easily measure the success of your platform. Getting feedback from users on a regular basis can be central to learning about areas that need improvement.

Leadership: If the leaders of your research group or organization are not on board with the creation and management of the platform, it will be difficult to sustain.

It Takes Time: Creating a functional online community (whether large or small) takes time. Success will not come overnight, and may take many months of work to achieve.

Be Prepared To Fail: Introducing a new tool into someone’s existing routine can be challenging. You will fail, but you can learn from these failures. The list above is an example of that. Keeping an open mind and learning from your failures can be the best way to create long—term success.
A “Virtual Platform Laboratory”
to study Online Engagement and Knowledge-Sharing

Launching in July 2013, the Virtual Platform Laboratory (VPL) project is testing how development organizations and project teams working on a global level can use easily-accessible, open-access technology to achieve better outcomes in their work.

"Virtual Platforms are online tools and systems that are designed to facilitate knowledge sharing, management and collaboration amongst geographically dispersed actors. International development organizations increasingly see these VPs as a means to connecting far-flung staff, partners, participants and supporters to document, compile and make sense of their collective learning to enhance real-world, "off-line results".

- **OBJECTIVES**

  - **Phase 1 (July to October 2013)**
    - Create a Virtual Platform Laboratory (VPL) to develop and test strategies and tools to potentially enhance and strengthen communication activities of development organizations;
    - Develop a work plan guided by the “12 key issues” identified at IDRC’s Canadian Learning Forum (CLF-2012); and
    - Explore and test the use of social media as a communications and networking tool.

  - **Phase 2 (November 2013 to December 2014)**
    - Create and use issue-specific “work spaces” as trial sites to test tools and best practices for communication, coordination and collaboration;
    - Develop “how-to” guidelines and planning strategies so that other groups can learn from project findings and easily create similar platforms;
    - Involve IDRC Learning Forum participants via direct communication and engagement.

- **METHODS**

  - Phase 1 (July to October 2013) project activities include:
    - Collecting and analyzing available research about effective online engagement;
    - Elaborating a detailed work plan, including an engagement plan for work spaces;
    - Creating an early version of the VPL, and confirm project test sites;
    - Presenting project plans to relevant groups at the Canadian Conference on Global Health in Ottawa (October 26-29, 2013).

  - Phase 2 (November 2013 to December 2014) activities will include:
    - Creating and using an open communication system to share project progress and results;
    - Exploring and evaluating various knowledge sharing strategies;
    - Based on a detailed engagement strategy, collaborate with the five test groups (“work spaces”) to implement and test tools and best practices;
    - Designing and testing a social media engagement strategy using appropriate online metrics;
    - Conducting a systematic end-of-project evaluation involving CCGHR members.

- **PROJECT VISUALIZATION**

  - The project currently consists of seven different “workspaces”, coordinated by members of the project team. A “work space” is an easily-replicable virtual platform designed specifically for project teams, working groups, or other relatively small networks, that aims to create a structure bringing geographically-dispersed people together to achieve common goals. Serving as team-specific knowledge and communications hubs, work spaces use a variety of online tools to coordinate these networking efforts—including blogs, email, Dropbox, and teleconference calls.

- **MONITORING & EVALUATION**

  - To better track the progress, outcomes, and impacts of the CCGHR’s Virtual Platform Laboratory, the project team is using IDRC’s Outcome Mapping framework. Outcome Mapping is a way of tracking the progress of a development project by measuring outcomes in the form of changes in behaviour of those individuals and groups involved. As stated in IDRC’s Outcome Mapping framework, “Outcomes are defined as changes in the behaviour, relationships, activities, or actions of the people, groups, and organizations with whom a program works directly.” (Earl et al., 2001). Phase 1 of the project has been largely guided by the development of vision and mission statements for the project (see detail to the right).

- **VISION**

  - The CCGHR’s knowledge platform is the hub of a thriving knowledge-sharing network of global health researchers and knowledge users. The network is inclusive, equitable, and easily accessible. Network members connect with each other and share knowledge in efficient and innovative ways, resulting in improved communication and greater ties between the production and use of knowledge. Network connections support the ongoing development of South-North research collaborations, strengthen existing partnerships and lead to the cultivation of new ones. New knowledge is shared with its relevant users, who in turn incorporate this knowledge into policy and practice, ultimately contributing to improved health outcomes. These outcomes are, in turn, communicated throughout the network, best practices that encourage ongoing learning and capacity-strengthening at individual, institutional, and systems levels. As a result of this strategic online communication—both at the broader network level and within specific research groups—knowledge is managed and shared much more efficiently than in the past. The result is a thriving GHR network that supports new partnerships and collaborations, creating a community of producers and users working together to address the global health challenges of the day.

- **MISSION**

  - The Virtual Platform Laboratory (VPL) project is a catalyst transforming the CCGHR into a thriving knowledge-sharing network of global health researchers and knowledge users. The project strengthens the CCGHR's current knowledge platform by developing and testing strategies and tools that promote better communication and knowledge sharing among users—and then actively diffuses these innovations and best practices among network members. Successful members actively use five different knowledge platforms on a routine basis to efficiently access and share information, and to develop dynamic new partnerships with other network members. Network members routinely circulate success stories of their resulting communications innovations, encouraging buy-in, adaptation and adoption by demonstrating how to better connect south-north research partners, strengthen existing partnerships, and cultivate new ones. Dissemination via traditional and social media platforms raises awareness of the project and the CCGHR among key audiences, creating greater stakeholder support, and diffusing network innovations among other knowledge users to encourage the development and use of similar knowledge platforms. All of this contributes to a dynamic, evolving, inclusive, equitable, easily accessible and innovation-diffusing network of global health researchers and knowledge users.

- **INTENDED RESULTS**

  - Products (outputs) will include: regular (approximately quarterly) progress reports; presentations at relevant national meetings; a “toolkit” of selected tools, “how-to” guides and descriptions of best practices; end-of-project reports (including the results of a comprehensive survey); and at least one publication in a peer-reviewed journal.

    - Originally anticipated outcomes include:
      - An efficient VPL that serves CCGHR members and a broader “community of practice”;
      - Five well-functioning “work space” groups;
      - An on-going blog that tracks progress and lessons learned, that will be publicly available;
      - A “Sustainable Management Plan” that identifies the capacity, time and monetary resources that the CCGHR will require for its virtual platform beyond October 2014, while serving as a working template for other organizations to learn from.

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