

**Report on the  
IDRC 2012 Canadian Learning Forum:  
Virtual Platforms, Knowledge Management &  
International Development**

February 7-8, 2012, Winnipeg

Dwayne Hodgson  
learningcycle.ca

May 2012  
IDRC Grant 106640

**Contents**

A. Abstract.....2

B. A Learning Opportunity .....4

C. Design Process .....5

D. Program Overview .....8

E. 12 Key Issues .....12

F. Assessment .....26

G. Next Steps.....29

Annex 1 Overview of the Participant Reflection Papers.....31

Annex 2 List of Learning Forum Participants .....36

NB: Throughout the report, we have *italicized* design features of the Learning Forum that we think may be promising practices.

## **A. Abstract**

Over the past five years, the Canadian Partnerships (CP) program at IDRC has supported a number of Canadian academic, research and civil society organizations to use online virtual platforms (VPs) in their research, policy development, project collaboration, capacity building and dissemination activities.

VPs 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”. Moreover, for organizations that work globally, VPs also offer the advantage of reducing the costs, inconvenience and pollution associated with international travel; and as more and more people in the global South are connecting to the Internet via mobile phones, the potential to reach new constituencies and to support collaboration between local, national and international actors is exciting, but also potentially overwhelming for staff charged with starting up and facilitating the use of these platforms.

To explore these issues, the CP team organized its first Canadian Learning Forum to enable existing and potential partners to share their experiences of using VPs for knowledge management. The forum was intended to contribute to meeting three of CP’s program-level objectives:

1. contribute a meso-level analysis of CP portfolio outcomes and learning via peer-to-peer exchanges and macro/program level analysis;
2. increase the public visibility of CP outside Central Canada and reach out to potentially new recipients of CP support; and
3. respond to an IDRC corporate objective of mainstreaming attention to Information and Communication Technologies in IDRC’s programs.

IDRC supported 25 participants from major universities, learned societies, development civil society organizations (CSOs) and research institutes to participate in the Learning Forum.

With the help of an external consultant, the CP Program team researched, designed, convened and facilitated a one-and-a-half day Learning Forum that supported active learning, dialogue, and peer learning through an innovative mix of academic and participatory learning methodologies (e.g. Dialogue Education). The learning design provided multiple opportunities for participants to exchange ideas and build on their experiences. It catalyzed this collective learning process by inviting Michael Furdyk, of TakingITGlobal, to provide a keynote address and by asking eight participants to prepare Reflection Papers that they later revised in light of their learning at the event.

This report provides an overview of the design process, the learning program and a synthesis of 12 key issues that international development practitioners should keep in mind when using VPs for knowledge management. Namely:

1. Frame the VP's Within Your Organization's Wider Knowledge Management and Program Goals
2. Play the Role of a "Bridging Organization"
3. Choose the Right Type of VP: Open vs. Closed
4. Build Trust, Safety and Accessibility
5. Realize the Potential of Crowd-Sourcing and Collaboration
6. Budget for the Cost of Animation and Maintenance
7. Choose the Right Tool – or Tools!
8. Evolve Gradually in Response to the Users' Needs
9. Set Realistic Expectations for Participation
10. Monitoring and Evaluating the Results of a VP
11. Consider Cost Effectiveness vs. Alternatives
12. Anticipate the Future

The report concludes with a list of suggested next steps and an assessment of the Learning Forum process and results. For the most part, the event was deemed a great success in how it encouraged dialogue and peer learning amongst a group with diverse interests and experiences with VPs and knowledge management.

## **B. A Learning Opportunity**

The [Canadian Partnerships \(CP\) program](#) at the International Development Research Centre (IDRC) is responsible for encouraging and strengthening collaborations between Canadian research institutions, universities, and NGOs and their developing-country colleagues to support joint research and exchange ideas.

### **The Potential of Virtual Platforms**

Over the past five years, the CP program has supported a number of Canadian academic, research and civil society organizations in their use of online Virtual Platforms (VPs) for research, policy development, project collaboration, capacity building and dissemination activities.

VPs are online tools and systems that are designed to facilitate knowledge sharing, management and collaboration amongst geographically-dispersed actors. Currently, VPs can include one or more of the following online technologies and tools: online forums (e.g. Ning), webcasts, blogs, microblogs (e.g. Twitter), social media (e.g. Facebook, Linked-in), online training courses (e.g. via Moodle), online collaboration sites (e.g. wikis, Google Docs), online video archives (e.g. YouTube, TED), listservs, multi-player online video games, Voice Over Internet Protocol (VOIP) communication channels (e.g. Skype), and other teleconferencing platforms. (Of course, as VP technology is evolving continuously, by the time you read this report, there will likely be new tools to add to the list!)

International development organizations increasingly see 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, “offline results”. Moreover, for organizations that work globally, VPs also offer the advantage of reducing the costs, inconvenience and pollution associated with international travel. And as more and more people in the Global South are connecting to the Internet via mobile phones, the potential to reach new constituencies and to support collaboration between local, national and international actors is exciting, but also potentially overwhelming.

### **Time to Reflect on Experience**

For international development organizations facing budget cuts and pressure to integrate Knowledge Management (KM) into their programs, VPs also risk becoming the “flavour of the month.” In a world where the media trumpet the release of the latest video game or social-network trend, and the cost of launching an online campaign is cheaper than ever, it is easy to see VPs as a “must-have” for knowledge sharing, project management and constituency engagement (especially to reach “the youth”!).

But before an organization launches yet another website or social media campaign, it is important to step back and ask:

- Do VPs really add value to the work of international development organizations or do they just add yet another mode of electronic communication that we must manage?
- How do VPs contribute to our organization's KM and program strategies?
- Does knowledge created and shared by VP users contribute to offline and real-world change?
- Are the results that VPs make possible really worth the considerable investment of personnel and technology to create, manage animate and curate an online community?
- How can VPs serve not only to share and disseminate knowledge, but also to produce and manage knowledge that supports development?

### **Organizing a Learning Forum**

To explore these questions, the CP team organized its first Canadian Learning Forum (LF) to enable existing and potential partners to share their experiences of using VPs for knowledge management. The LF was intended to contribute to meeting three CP program-level objectives:

1. contribute a meso-level analysis of CP portfolio outcomes and learning via peer-to-peer exchanges and macro/program level analysis;
2. increase the public visibility of CP outside Central Canada and reach out to potentially new recipients of CP support; and
3. respond to an IDRC corporate objective of mainstreaming attention to Information and Communication Technologies (ICTs) in IDRC's programs.

## **C. Design Process**

The CP Program team worked hard to design, convene and facilitate a LF that supported active learning, dialogue, and peer learning.

### **The Design Team**

The LF was designed and managed by a team of CP staff, including:

- Luc Mougeot, Senior Program Specialist, was responsible for the project and led the planning team;
- Stacie Travers, an IDRC Research Award recipient, liaised with IDRC travel and local venue managers to secure facility and equipment, estimate budget, monitor spending, confirm participants. She also supported final editorial work on Forum documents;

- Claire Thompson, Program Management Officer, provided inputs throughout and liaised with IDRC Communications for pre-Forum publicity, led audio-visual coverage during Forum and material production for post-Forum dissemination;
- Carole Garneau, Program Assistant, and Aida Du Bois, Grant Administration Officer, administered the grants and arranged travel for the participants;
- Ann Weston, Director of the Special Initiatives Division, provided additional input throughout the design process and liaised with local co-hosting institutions in Winnipeg; and
- Dwayne Hodgson, a consultant with [learningcycle.ca](http://learningcycle.ca), worked with the CP team to research, design, and facilitate the LF, edit the participant reflection papers and compile the final report.

### **Background Research**

The design process began with background research on the topic and a survey of past CP grant recipients and other selected international development organizations. The survey asked how these organizations were using VPs for KM, what challenges they were encountering, the difference it made to their work, and what they would like to learn more about. Thirty-two organizations with a wide range of experiences and expertise responded. Conducting this survey was helpful in identifying whom to invite and the learning needs; it also gave us confidence that the participants could serve as resources for each other's learning.

### **Setting Clear Achievement-Based Objectives**

The survey findings helped the CP team draft six Achievement-Based Objectives (ABOs) for the LF that defined how the participants would actively learn together. Specifically, they would:

- **map** the types and uses of VPs in their work;
- **share** experiences of how using VPs for KM lead to specific development outcomes;
- **distill** the best practices & challenges of using VPs for KM in international development;
- **foresee** the upcoming trends and developments in connectivity that could affect their VP;
- **name** some potential modifications to their VPs to improve their results; and
- **suggest** how CP can better support their work via VPs.

These ABOs guided the subsequent design decisions and ensured that the LF program supported active learning, peer exchanges and reflection.

### **Inviting a Diverse Group of Participants**

Twenty-five organizations were invited to attend the LF with IDRC's full support. The group included representatives of major universities, learned societies, development civil society organizations (CSOs) and research institutes (See Annex 2 for a list of the participants). The participants also brought different levels of experience: some have been pioneers in the field of ICTs since the days of floppy disks and dial-up connections; others are just launching their first VPs and are leap-frogging to use cloud computing and smart phones. Inviting a diverse group of participants with different levels of experience was key to optimizing the potential for dialogue, exchange and peer learning.

### **Pre-Learning Forum Discussions**

To prepare for the LF, eight participants were invited to write a short reflection paper on their experiences with VPs in the context of their KM strategy. In January 2012, seven draft papers were posted on a dedicated IDRC Learning Forum Virtual Platform that we set up for the participants to review the papers and share their questions and experiences. This invitation-only VP also served as a place to post updates on the logistics and program of the forum. We also used it during the LF to record answers from some small group exercises.

### **Locating a Key Resource Person**

In order to meet the CP Program's second program-level objective of increasing its visibility and reaching new audiences outside of Central Canada, the team decided to organize a public event on the evening of the first day. We invited Michael Furdyk, co-founder of [TakingITGlobal](#) (TIG), to make a keynote presentation at the event, and to serve as a resource person during the LF. Although still relatively young and working with a youth-focused organization, Michael is a leading innovator in the use of online collaboration to mobilize millions of young people around the world to address social and environmental issues. His enthusiasm, examples and expertise were inspiring, and his story illustrated the potential reach and impact of VPs.

### **Designing for Dialogue & Learning**

The LF was designed using a [Dialogue Education](#) approach to participatory, peer learning. The learning design blended formal academic presentations with active learning activities that invited the participants to share their expertise, consider new ideas in light of their context, apply new concepts and skills, and synthesize their learning going forward.

The program alternated between large group, small group, pairs and individual exercises to sustain the energy and accommodate various learning preferences. Verbal and written comments from the participants suggested that they greatly appreciated the variety of learning activities and were pleased with how much we were able to accomplish in one-and-a-half days.

## D. Program Overview

**Tuesday, February 7, 2012 - Morning**

### Introductions

The LF began with a short welcome and introduction from Ann Weston, and an overview of the objectives and agenda by the facilitator. Dwayne then invited the participants to name one expectation of what they hoped to learn, experience or do by the end of the LF and to write this on a post-it note. (To demonstrate our accountability and to identify resources for follow-up, we invited them to review their own expectations at the end of Day 2 to see how well these had been met).

### Mapping Our Work with Virtual Platforms

We continued with an introductory exercise in which participants reflected on 12 questions about themselves, their organization or their work (e.g. *How many members are there on your VP?*). For each question, they moved to one of four flip charts that corresponded with a possible answer (e.g. *under 50, 51-100, 101-500, more than 500 members*). At each flip chart, they were asked to introduce themselves briefly to one other person, and discuss their answer. *This kinesthetic activity really energized the start of the LF, set the tone for the event, and most importantly, helped the participants connect so that the subsequent discussions were more substantial.*

	<b>Needs</b>	<b>Interest</b>	<b>Learning</b>	<b>Practice</b>
<b>Sectors</b>				
<b>Policy</b>				
<b>Advocacy</b>				
<b>Epistemic</b>				

---

<sup>1</sup> Partly inspired by a literature review in: Stacie Travers (2011) Canadian Civil Society Influencing Policy and Practice: The Role of Research. CP Research Report 5, 85 pp.

Having clarified its audience's sector(s) and needs, VP managers should then ask:

1. What is the role of VPs in my KM strategy?
2. What issues do we face in creating, maintaining and facilitating the VP?
3. How can we deal with these issues?

### Panel Presentations

Four participants gave 20-minute presentations highlighting the findings of their Participant Reflection Papers. (Please note that the papers below are available in English only.)

Panel Presenter	Click on the links to view:
Heather Creech, <a href="#">International Institute for Sustainable Development</a> (IISD)	<a href="#">VP</a> / <a href="#">Paper</a>
Kate Roberts, <a href="#">Cuso International</a>	<a href="#">VP</a> / <a href="#">Paper</a>
Cristina Galofre, <a href="#">Equitas</a>	<a href="#">VP</a> / <a href="#">Paper</a>
Rory McGreal, <a href="#">Athabasca University</a>	<a href="#">VP</a> / <a href="#">Paper</a>

They then responded to questions after each set of two presentations. *Providing the papers ahead of time via the LF VP allowed the presenters to be more focused and make the best use of their 20 minutes.*

### Tuesday, February 7, 2012 - Afternoon

#### World (Internet) Café

After lunch, we participated in four rounds of a World Internet Café in which five "hosts" demonstrated their VPs for the other participants.

World (Internet) Café Hosts	Click on the links to view:
Nelly Bassily, <a href="#">Farm Radio International</a> (FRI)	<a href="#">VP</a> / <a href="#">Paper</a>
Carol Tisshaw, <a href="#">Save the Children Canada</a> (SCC)	<a href="#">VP</a> / <a href="#">Paper</a>
Aniket Bhushan, <a href="#">North-South Institute</a> (NSI)	<a href="#">VP</a>
Mario Torres, <a href="#">CEBEM</a>	<a href="#">VP</a> / <a href="#">Paper</a>
Leslie Chan, University of Toronto	<a href="#">VP</a>

*Using this World Internet Café format allowed individual participants to focus on their priority questions, offer targeted advice and collaborate to create new solutions. Some highlights of these conversations were captured by rapporteurs and are reflected in the Key Issues discussion below.*

### **Conversation with Michael Furdyk, TakingITGlobal**

Michael wrapped up the afternoon of Day One by sharing his experience in using online platforms to mobilize youth to address global issues. This session focused on how TIG has assessed the impact of its work, how to create a “sticky” platform that participants will return to and draw others, and future trends in internet connectivity, including mobile computing.

A copy of his presentation’s slide deck is available in PDF format at <http://store.takingitglobal.org/mike/IDRCWorkshop.pdf>. In it, he profiles a number of very useful online resources that can help an organization multiply the reach and effectiveness of its VP. The participants then took part in small group discussions to reflect on the lessons from Michael’s work for their own organization and VPs.

### **Tuesday, February 7, 2012 - Public Evening Event**

IDRC and local co-hosts, the International Institute for Sustainable Development (IISD) and the International Development Studies Program at Menno Simons College at the Canadian Mennonite University held a public event entitled “TakingITGlobal: Creating VPs for International Development”. This event featured an evening keynote address by Michael Furdyk that was translated into French and recorded on video ([View](#) on IDRC website). Around 40 people attended. Before and after the presentation, LF participants showcased their VPs on laptops.

### **Wednesday, February 8, 2012 - Morning**

#### **Panel Conversation**

As a complement to Day One’s panel presentations, we organized a “Panel Conversation” in which the facilitator asked a series of questions to three other Participant Reflection Paper authors, as well as one other select participant:

<b>Panel Conversation Participant</b>	<b>Links to their:</b>
Nelly Bassily, FRI	<a href="#">VP</a> / <a href="#">Paper</a>
Carol Tisshaw, SCC	<a href="#">VP</a> / <a href="#">Paper</a>
Mario Torres, CEBEM	<a href="#">VP</a> / <a href="#">Paper</a>
Leslie Chan, University of Toronto	<a href="#">VP</a>

After 45 minutes, the “audience” was invited to ask their own questions. This *less formal “talk-show” format of the panel conversation worked well in that it allowed us to focus on specific issues and for the participants to build on each other’s answers.*

#### **Learning Synthesis Tasks**

We concluded the LF with four “learning synthesis” tasks:

### **1. Small Group Conversations:**

Participants worked in small groups to assess their VP and KM work in light of Luc's framework and three of his questions:

- a. Which Knowledge-Community sector do I primarily belong to?
- b. Which Knowledge-Community sectors & needs do I currently and/or wish to influence?
- c. How can my VP better fulfill these needs?

They then summarized their responses in a graphic – on paper or via the Ning and presented some highlights of their discussions. Some used the framework as provided; others modified to include new audiences and needs. But overall, they found the three questions were helpful to consider how their VP contributes to their KM strategy.

### **2. Individual Reflection:**

For the second learning synthesis task, we asked the participants to individually reflect and write down some thoughts on four questions:

- a. What has you looking at VPs and KM from a new perspective?
- b. What new questions do you now have?
- c. How might you collaborate with IDRC and/or other participants to improve your work in VP & KM?
- d. In light of this workshop, what changes would you like to make to your VPs to improve their effectiveness?

Participants then shared a selected answer with colleagues in pairs or trios. Several also shared their forms for our report.

### **3. A Review of Participants' Expectations**

In order to demonstrate our own accountability to meeting their needs and to identify any unmet expectations, we asked the participants to locate their written expectations from Day One and rate how well they had met it by placing it on a chart labeled "Expectation Met" or by leaving it if it remained unmet.

### **4. Complete a Participant Feedback Form.**

Finally, participants completed a short written feedback form that invited them to name a highlight of their learning, provide some suggestions to improve the experience, rate the achievement of the Objectives, and name what they will do to apply their learning. A summary of their responses by theme was posted on the LF VP.

*Reflection: Providing space in the learning design for individual pairs and group reflection provided an opportunity for the participants to synthesize the rich content and*

*look ahead to how they will apply their learning. Documenting the results also suggested some ways that IDRC can follow-up to support the participants in applying what they learned at the LF (See Next Steps).*

## E. 12 Key Issues

Summarizing all the rich learning that took place at the LF is a challenge given that so much of the learning happened in peer-exchanges. However, based on the work of the paper authors, Luc's synthesis, Michael's presentations, and the findings of the various small and large group activities, we identified twelve key issues that organizations need to consider when creating and managing VPs as part of their KM efforts. The good news is that for every issue that was identified, the LF participants had already come up with a number of innovative solutions.

### Creating and Managing VPs: 12 Key Issues



In the following pages, you will find a short summary of our reflections on those issues. If you would like to go deeper, we invite you to [view](#) Michael's video and read the Participant Reflection Papers (see Annex 1, p. 31).

## **1. Frame the VP's Within Your Organization's Wider KM and Program Goals**

Before going to the trouble of creating a VP, it is important to first clarify the organization's wider strategy for KM (including knowledge creation, production, and dissemination), and in turn how KM contributes towards more efficient and empowering processes that help in achieving your program's expected results.

Equitas, for example, has developed a participatory approach to learning and KM that supports all of its programs. It designed its Equitas Community as part of a larger online and offline system that supports knowledge sharing, KM and continuous learning for action (Galofre et al., 2012, p.3). Similarly, Cuso International and CEBEM's KEDLAP program provides a clear explanation and conceptual map of how their VP will support their broader KM and development objectives (Roberts & Pabon, 2012, p.3).

As per Luc's framework, it is important to then consider the different KM audiences, their particular information needs and the best VP technologies to meet these needs. The diversity of organizations represented at the LF, including researchers, academics, NGOs and think tanks, illustrated the range of ways that VPs can serve different KM functions such as research, dissemination, capacity building, policy formation, advocacy and public education.

In selecting the right VP or combination of platforms, organizations must also ask themselves:

- what can a VP do that can't be done through other offline or lower-tech means (e.g. a face-to-face meeting or teleconference)?
- what is the best technological choice for your participants in terms of Internet access and personal capacity and comfort with the technology?
- how interactive does your VP need to be to achieve its aims?

Creech also argues that VPs need to follow the principle of "subsidiarity" or getting the kind and format of information to actors that is relevant to their sphere of activity, i.e. which will best enable them to influence attitudes and behaviors of others that are within their reach, for positive change (IISD, p. 9).

## **2. Play the Role of a "Bridging Organization"**

The role of VPs has evolved with the changing nature of the Internet. Initially,

international development organizations used their websites primarily as a tool for disseminating their messages to Northern audiences who had web access (Web 1.0). However, with the advent of wider web access and increased interactivity and online collaboration, Creech (2012) suggests that international development organizations that manage VPs need to serve as “bridging organizations” to link the VP participants with others whom they can learn from and/or influence (Web 2.0).

The role of the bridging organization is no longer to be the “authority” on any topic; rather it needs to “provide an arena for knowledge co-production, trust building, sense making, learning, vertical and horizontal collaboration and conflict resolution ...and to enable social learning or the process of iterative reflection when experiences and ideas are shared with others (e.g. through joint problem solving and reflection)” (Creech, 2012, p.9).

CEBEM, for example, sees a key outcome of its work as serving as a bridge between academics, researchers and NGOs and grass roots organizations (GROs). Through its online capacity building and education programs, it systematically supports connections that were previously sporadic, exceptional or even impossible:

*“What in the past was mandatory due to the need of physical access to books and reports – for example, the creation of comprehensive libraries in each place – is now unnecessary, and almost irrational, given the possibility to mobilize knowledge partnerships to create pools of knowledge resources. On this basis, online education may reach a variety of content, extent, and depth with no parallel in the past” (CEBEM paper draft, 2012).*

Similarly, FRI also cites how convening the Barza community marks a significant change in its role:

*“Through Barza we are establishing new connections with others people who are interested in and dedicated to agricultural media. When Farm Radio International started in 1979 (known back then as Developing Countries Farm Radio Network), information and KM were top down – we disseminated scripts written in Canada. Barza creates the potential for more horizontal, user-developed knowledge management” (FRI,2012, p. 7).*

IISD’s Entrepreneurs Toolkit offers another example of this shift from Web 1.0 to 2.0. It evolved from being a static resource to present basic information on how to set up a micro social/environmental enterprise to becoming a site in which users from around the world share content with each other and create new possibilities (p. 6). However, changing the organization’s role from being the “expert” source of information to facilitating the sharing of other information often requires an institutional change to open up access to knowledge. As Creech *et al.* (2012) note:

*“Institutional cultures can become significant barriers to the effective and timely sharing of an institution’s knowledge; and bringing in outside knowledge, including from the local level, may significantly challenge or change an institution’s work” (Creech et al., 2012, p. 10).*

IISD’s work also illustrates how the KM strategies of some international development organizations, and hence their VPs are shifting in focus. Until recently, there seems to have been a lot of focus on how to connect Northern and Southern NGOs to support managing development programs and research. But increasingly they are starting to pay more attention to supporting links between local-to-local and local-to-national actors, sharers, receivers and indirect beneficiaries (Creech et al., 2012, p. 4). As such, the role of Northern “bridging organizations” may increasingly be to help build the bridge, and then step back to let others use it. In time, as VP technologies become more common and accessible in developing countries, even this bridging role will likely become local.

### **3. Choosing an Open vs. Closed VP**

The objectives of the VP within your organization’s KM system - whether knowledge management, production or dissemination – and the needs of your audiences, will help determine whether the VP should be open to everyone, or cater to a smaller closed network. McGreal’s paper on the experience of Athabasca University noted that both have their pros and cons. If you want to create safety and trust, a closed network works better. But for getting research results and innovations “out there” or drawing on the potential for mass collaboration, you may want your network to be as open and porous as possible.

The Equitas Community offers an interesting illustration. In her presentation, Galofre noted how maintaining its community as a “closed” group is essential for building trust and even ensuring the physical security of its members (many of whom are human rights activists working in undemocratic countries). However, Equitas realizes that maintaining this as a closed network can limit how well the VP functions in terms of dissemination and outreach beyond its network of alumni. To compensate, they are looking for ways to package and disseminate *some* of this new knowledge beyond the Equitas Community (e.g. posting summaries of online conversations of Equitas members without revealing their identities).

The issue of closed vs. open networks also touches on the question of whether everyone who participates in a VP necessarily wants to share their knowledge. Creech’s paper, for example, suggests that there may be different interests and attitudes amongst VP participants. On the one hand, academics, researchers, donors and other Open Access advocates value providing open access to information as a way to enhance collective learning and innovation. However, some local project participants,

entrepreneurs and consultants may have concerns about sharing their knowledge and tools more widely, if they perceive this as compromising their business interests.

Barza, for example, noted that not all local farmers want to share their best practices lest they lose their competitive advantage.

Even in non-profit settings, we need to remember that every VP user will consider the time required to access the VP, share their knowledge, and interact with others vs. the anticipated rewards: recognition, access to feedback or other resources. TIG addresses this by providing compensation for users' contributions through increased prestige (e.g. raising their profile on the site, providing links to other websites, online badges). Other members are experimenting with paying for content or partnering with 3<sup>rd</sup> party organizations to co-create content.

Individuals and organizations that rely on grants may also be reluctant to expose themselves to criticism in a public forum that donors might access. However, some NGOs, like Engineers Without Borders, are increasingly seeing publicly admitting failure to reflect on mistakes as an important learning opportunity (e.g. [Engineers Without Borders failure report](#)).

#### **4. Build Trust, Safety and Accessibility**

A key function of a bridging organization is to build trust and to ensure the safety and accessibility of the VPs for all of the participants. Trust is a crucial requirement in order for people to share their ideas, insights and initiatives, especially in an online environment where they may never actually meet face-to-face.

Creating a safe environment for sharing ideas and dialogue is also key. The experience of both TakingITGlobal and FRI is that VP participants tend to most trust information from people whom they know; moreover, the richest interactions tend to occur between people who are within two connections or degrees of separation from each other (IISD, 2012, p.9).

The number and diversity of participants who use a VP can be a factor. Equitas, for example, recognizes that a key reason that its human rights education alumni use its network is because they can trust and rely on the information they access there since membership of the VP is limited to members sharing common experiences in human rights work. This trust is a form of "social capital", which they see as essential for knowledge creation and sharing (Bassily and McKay, 2012).

The LF participants cited a number of ways in which international development organizations can build trust on their VPs, including:

- integrating the VP with real-world, face-to-face contact (e.g. FRI tries to facilitate real-world, face-to-face meetings for its participants in order to make the online collaboration easier and richer);
- personally welcoming new participants in an online education forum and offering them 30 minutes of free mentoring (TIG);
- both TIG and SCC invest significant staff resources to facilitate and curate VP to keep it up to date, inviting and user-friendly; and
- maintaining online security by verify postings to screen out fraudulent posts and spam, and protecting the site from “attacks” by using online security software (TIG).

### **Safety**

Safety can include creating a culture of respect and dialogue on a VP in which different opinions are valued and knowledge sharing is encouraged. Providing some guidelines on what is appropriate language and content can keep the VP open and productive. “Safety” can also have offline implications. For example, since many of its participants work in politically dangerous situations, Equitas limits access to its VP and protects the identities, locations and contact information of participants. In contrast, Barza seeks to raise the profile of its members and invites them to post their biographies, photos, and contact information to facilitate independent communication and access. Again, the purpose to be served by the VP within the wider KM and organization strategies should determine the best type of network – open or closed (see below) – and the choice of platform.

### **Accessibility:**

The VP interface must also be intuitive and easy to use, with ‘just enough’ features to make it functional and accessible for all its members, regardless of:

- **Language:** Ideally, the VP should be accessible to all users, regardless of their native language and second-language proficiency. However, outside of China, English is often the predominant language on the Internet and online translation software (e.g. Google Translate) still leaves a lot to be desired. CEBEM addresses this by finding instructors who are proficient in Spanish; Barza allows users to publish radio scripts in their local language.
- **Technological Access:** A VP designed for KM in international development must also take into account the varying levels of access, affordability and bandwidth that exist throughout the world. Can your VPs be accessed by any type of computer? Do they require proprietary software that may be unavailable in the South? Does your VP require a high-speed connection and/or use graphics and animation that are simply too big for users with slower connections and computers? Will your VP work for participants who use a mobile phone to access it?

- **Technical Skills.** Bridging organizations also should not assume that the members of a VP necessarily have all the skills needed to utilize VPs for knowledge sharing; they will need to build this capacity (Creech et al., 2012, p. 10). Equitas, for example, provides training on how to use the VP during face-to-face meetings. They also organize online training-of-trainers workshops to ensure that the instructors are comfortable with the online tools and teaching approach. KEDLAP also provided an online user manual for the eZ-Publish system they were using.

Several of the LF participants also pointed out how access to intellectual property is increasingly a contested issue, as corporations assert their rights to control intellectual property and software. They encouraged the other participants to ensure that they use [Open Educational Resources](#) (OER), [Open Source](#) software and [Creative Commons](#) licensing that permit different levels of re-use and recreation.

## **5. Realize the Potential of Crowd-Sourcing and Collaboration**

As mentioned earlier, international development organizations have seen their role change from using the Internet to broadcast their content to playing a bridging role to create and manage VPs that support communication between staff, participants and external partners.

They are also realizing that VPs have the potential to mobilize the collective contributions of hundreds, perhaps even thousands, of participants from different sectors around the world to share knowledge, collaborate and create new knowledge.

In some cases, a properly-designed VP “crowd-sources” or leverages the knowledge, work and time of a far-flung community of learners and users to create new knowledge products. For example, although TakingITGlobal is a relatively small organization with 20 employees and a similar number of rotating interns, it has excelled at mobilizing the contributions of its online membership to generate new content, recruit other members and even to translate content into dozens of languages. By drawing on the contributions of its members and using the power of asynchronous collaboration, TIG has magnified its reach and impact far beyond its physical size.

## **6. Budget for the Cost of Animation and Maintenance**

Managing VPs requires ongoing maintenance and active animation. It is not enough to create a website with comments and hope that the participants will self-organize and create new knowledge! You will need to budget staff time and resources for ongoing animation and maintenance of the VP content and tools.

FRI, for example, created a basic networking platform and asked its users to sign up, create a profile and share their radio scripts and ideas online. But it soon found that sustaining their initial enthusiasm was difficult:

*“When people first sign up they are very enthusiastic; they want to fill out their profiles and introduce themselves in the introduction forums. However, over time, it seems that the initial enthusiasm wanes, perhaps due to issues of the availability and the cost of internet access and users not having sufficient time or skills to utilize Barza”* (Bassily and McKay, 2012, p.7).

IISD similarly found that it was difficult to achieve “spontaneous contributions” from entrepreneurs [on its Entrepreneur’s Toolkit VP]. To animate the VP, it realized that they needed to provide capacity-building training for the members, pay for additional content to fill in the gaps in the toolkit, and hire interns within member organizations to add content (p. 8).

Successful VPs require a considerable and ongoing investment of staff time and resources to:

- clarify how the VP contributes to the wider KM and program goals;
- design and create the VP tools and systems;
- recruit and approve members (at the outset, but sometimes on an ongoing basis);
- manage the technical aspects of the site (e.g. layout, code, plug-ins, security, functionality, search-engine optimization, accessibility);
- train users on how to use and make the most of the VP;
- curate the content (e.g. by keeping it up to date, organized, searchable, and “sticky”) so that participants return to the site often; and
- facilitate the learning processes: asking open questions to prompt discussions, moderate generative and convergent processes, validating new ideas.

Most of the LF participants had at least one staff person whose job description includes managing their VPs. Equitas, for example, hired a full-time administrator and later instituted a core committee of four staff to provide organizational support to the VP community. KEDLAP also provided technical assistance throughout the program to maintain the server, update the system and security features, and to support the users on how to store and organize information on their portal. However, they found it was helpful to keep the roles of technical support and content-focused facilitation of knowledge interaction separate (Roberts & Pabon, 2012, p.7).

Michael from TIG also listed a number of creative ways in which TIG keeps their VPs active and *interactive*, including:

- providing incentives for participation (e.g. TIG is experimenting with using online badges and prizes to encourage contributions);
- creating interactive learning opportunities (e.g. TIG uses online simulation games that are fun and informative);
- keeping the VP content fresh and up to date (e.g. a stream of daily features); and
- offering the possibilities of publication.

## 7. Choose the Right Tools

The list of available web-based tools is constantly evolving as new proprietary Internet Platform services (e.g. Ning), Open Source software (e.g. Moodle), and Social Media (e.g. Twitter, Facebook, Pinterest) seem to come online every week. These innovations represent the great potential for the web to bring international development actors together in ways that were never possible before; yet at the same time, keeping up to date, resolving incompatibility issues between operating systems and software (e.g. tablets that don't run Adobe Flash animations) and adapting to new technological innovations while remaining accessible to users in the South is a challenge.

The participants at the LF were employing a range of in-house and “off-the-shelf” solutions. Some, like FRI with its Barza community and Equitas, have developed an inclusive, stand-alone web portal.

Others, like CEBEM and KEDLAP, combined a suite of online tools like email, RSS feeds, Facebook, Twitter and Skype, with customized VPs hosted on their servers. In both cases, the online interface was kept as simple as possible to ensure access for users, no matter where the users were accessing the VP. Athabasca University, similarly, uses a suite of tools from its “cupboard” to support learning and build community. Some of these elements were developed in-house, while others are 3<sup>rd</sup> party applications that integrate with other elements of the VP.

In selecting the appropriate tool or suite of tools for your VP, however, it is important to keep in mind five sub-issues:

1. Given the pace of technological change, your VP may have a shorter shelf-life than you expect, so create a “flexible platform” that is easy to adapt to new innovations (e.g. Athabasca integrates new 3<sup>rd</sup>-party plug-ins), and websites that follow [common web standards](#) and/or that integrate with popular social media (e.g. Facebook and Twitter) that users are likely to use in the future. Even so, you will probably need to update your VP tools continually and eventually replace them as technology changes.
2. Many VPs integrate several synchronous and asynchronous tools for different functions that work slightly differently (e.g. Skype for direct communication, listservs and forums for information sharing, databases for archiving). But the experience of

Athabasca University showed that the more tools your VP incorporates, the more confusing it can be for less-proficient users; so keep it as simple as possible.

3. In some Southern countries, internet access may be limited in terms of physical access points, broadband width and speed. Many of these users may be working on computers with older internet browsing software or handheld devices. So be sure to design a site that works with less than cutting-edge technology. Amongst the participants, some examples of “appropriate technology” for VPs included:

- interactive call-in radio shows for farmers (FRI),
- listservs for senior communities of practice (GACER),
- email for learning communities of professionals (CEBEM),
- using cell phones for children (SCC), and
- video testimonials (University of Toronto),

4. Beware of creating yet another network to sign in to. These days it seems that every company, organization and social media group wants you to create a distinct user name and password. But given the problem of the “economy of attention” and simply the trouble of needing to take extra steps to log in to another site, it is advisable to create a VP that works well with existing modes of communication (e.g. an online forum that pushes updates to the email box for easy access) and/or, as TIG does, allowing users to log in with their Facebook or other popular username and password.

5. Larger organizations, particularly those with dedicated IT departments, may prefer developing a customized VP that can be hosted on their own server, as this affords more control over the design, maintenance and security. But setting up a VP from scratch may take weeks or months, and a large investment of staff-time.

International development organizations, particularly smaller groups with less capacity or money, may instead decide to use the services of an online, “off-the-shelf” solution that is hosted on a 3<sup>rd</sup> party server (e.g. Moodle, Ruzuku, Ning, WordPress). These services, both Open Source or for-profit, offer a nimble and cost-effective means of developing a VP in hours rather than weeks. However, their business model can sometimes limit how much you can customize the VP without paying for a higher level of service; moreover, before you begin, be sure that you understand the intellectual property and privacy protection provisions of the service. Regardless of which VP tools you use, the example of TIG shows that there are many 3<sup>rd</sup> party platforms that can be used for search engine optimization, dissemination and web analytics. (Please see Michael’s presentation for more examples).

## **8. Evolve Gradually in Response to the Users' Needs**

The experience of many of the LF participants is that VPs work best when they start modestly and then grow “organically”, in response to the users’ emerging needs. For example, Athabasca University has successfully added new features and plug-ins in response to users’ needs and innovators’ suggestions. Equitas also found that:

*Given that communities of practice evolve through different stages of development (Wenger, 1998), different activities, events and tools have been implemented over time in order to respond to the evolving needs of the Equitas Community. These strategies have had varying levels of success in addressing the changing needs of members, creating interest and active participation as well as enabling knowledge sharing. (p.5)*

The lessons from SCC, FRI, TIG and others are that VP managers should launch a VP as a basic platform with “just enough” features to help users get started. Once the participants have mastered these, you can then add more functions and interactivity. Cuso International and CEBEM also used the results of their mid-term evaluations to inform their adaptations.

## **9. Set Realistic Expectations for Participation**

As the Internet universe continues to expand and VPs proliferate, it can seem like we are facing an overwhelming amount of information and opportunities to participate. But this growth does raise questions about how many VPs most users can actively engage with and what a realistic expectation of how busy a VP will be. Several of the Participant Reflection Papers (e.g. Cuso International, FRI) raised concerns that after an initial period of “sign-up” euphoria, participation rates dropped off precipitously; from then on, the VP required extensive animation to maintain the user’s level of involvement.

It is important that VP creators and managers set realistic expectations for participation, Creech notes, citing Nielsen’s rule that in a network of 100 people, typically:

- 1 person is actively animating the network;
- 9 participate actively on a regular basis; and
- 90 are more passive “lurkers” who will occasionally join in when something interests them, but otherwise stay quiet.

This experience was echoed by many other participants at the LF. But as McGreal noted in his presentation, if Nielsen’s rule is correct, it raises a question about what the optimal size of a VP must be to be sustainable (e.g. Does your VP need 1,000 members in order to have 10 highly involved and 100 active members who can help meet your KM objectives?).

Alternatively, it may be best to learn from CEBEM's experience that "online communities of knowledge and learning communities exist only as loose systems of knowledge exchanges among people that fluctuate in intensity depending on discipline, topic, timing or practice" (p. 5). In that case, the participants will choose the level of involvement that works for them, given the cost and benefits of sharing knowledge and collaborating. The task then of the bridging organization, Furdyk explained, is to make your site as "sticky" as possible so that people want to return to it and it draws in new members.

## 10. Monitoring and Evaluating the Results of a VP

As international development organizations dedicated to addressing poverty and advancing social justice, we all want to see change in the real world. But assessing the impact of our VPs is challenging. How do you demonstrate to your peers, local partners, donors, and the public that online networking is more than "slacktivism" (e.g. the underwhelming real-world follow-up to the viral [KONY 2012](#) campaign)? And beyond producing impressive statistics about the number of hits and "likes" on your website, how do you link online collaboration to "real-world" results? The LF participants were addressing this challenge through a variety of means.

- CEBEM assesses its online capacity-building program through multiple metrics, including: the numbers, location and composition of its participants; their performance in the courses; participant feedback on the course quality and utility; and how the VP helps establish links between different actors across sectors. CEBEM also looks for examples of how its online forums evolve into courses and publications (Torres, 2012);
- FRI uses Google's web analytics to assess the reach of its Barza network, along with surveys of its users. It also provides case studies of its users' profiles and activities (Bassily & McKay, 2012).
- KEDLAP conducted mid-term and end-of-project evaluations to assess both development knowledge (e.g. how VP participants used resources which they accessed online) and more generalizable learning outcomes about the use of technology for KM and creation (Roberts & Pabon, 2012).
- Equitas uses follow-up questionnaires to monitor the use and access of its VP, as well as the participants' perception of the VPs benefits for their work. Respondents so far have cited how it strengthens their networks and relationships, helps them share information, apply their learning and change their perspectives, attitudes and values (Landry & Galofre, 2012, p. 8-9).
- TIG systematically monitors its network every two years to assess the participants' perception of their utility, to collect stories of behaviour change

(e.g. anecdotal evidence on users switching consumer brands) and examples of where TIG users found employment; and

- Leslie Chan from the University of Toronto also mentioned how they look for evidence of citations of publications by students, reinvestment in research, and policy changes that online activity may have supported.

But to assess the real world impact (i.e. did a VP lead to development results offline?) is much harder, given the geographic dispersion of the VP members, reliance on self-reporting and the fact that VP members are likely to be influenced by multiple channels of information and communication, both online and offline.

Moreover, predicting the expected results of a VP beforehand (e.g. as part of the performance measurement framework in a funding application) is challenging. What does success look like in terms of participation and impact? (NB: Furdyk suggests aiming for 30% participation in an online community, but 5% is common). Instead, assessing the results of a VP requires monitoring and evaluation methods that are better suited to complex and complicated environments that retroactively look for evidence of contribution, rather than predicting rates of success that are directly attributable to your VP.

## **11. Consider Cost Effectiveness vs. Alternatives**

Given the considerable cost involved with preparing and building a VP, to recruit and support members and maintain the network, and the difficulty of isolating results that are directly attributable to the VP, it is fair to raise questions about the cost effectiveness of using VPs.

In response, CEBEM, Equitas, Athabasca University and others suggest that this is a moot point. VPs are undoubtedly more efficient than older, obsolete non-electronic means of disseminating knowledge (e.g. mailed newsletters and printed journals), and the archival functions and collaboration afforded by VPs are unprecedented. KEDLAP also found that the archival function of a well-run VP was far superior to older ways of KM (i.e. you can more easily access older resources online than in locating print copies of “grey literature”).

Since the Internet is here to stay and VPs will only proliferate in scope and influence, international development NGOs will need to optimize the investment of staff time and money (e.g. be flexible and innovative to take advantage of emerging, low-cost online solutions to contain costs; use crowd-sourcing and online collaboration to create and curate knowledge (e.g. as with Wikipedia).

## 12. Anticipate the Future

A final issue that we explored at the LF concerned what is coming “down the information highway” that international development organizations should be aware of. Several trends were cited:

- 1. The next Internet revolution will be “mobilized”:** The potential of mobile phone technology is exciting given its prevalence, penetration and cost effectiveness in many Southern countries. However, it is important for bridging organizations to consider the usability of their platforms on smaller devices, including mobiles – both “Smartphones” and more basic hand-held units. This may involve many design and technical issues.
- 2. Old school technology still has a role:** Many of the participants (e.g. Save the Children) mentioned how blending VPs with face-to-face contacts was a key factor in the success of their VPs. And as the Barza case study illustrates, VPs can successfully amplify the impact of “traditional” technology like radio. For FRI’s audience, radio offers many advantages that cell phones as yet do not (e.g. reaching rural communities, providing a more communal experience). When combined with mobile technology, radio can be an even more powerful format that permits deeper interaction and collaboration (e.g. call-in radio shows for farmers).
- 3. Open vs. closed access:** Several LF participants warned that the debate between Open Access (e.g. to information, curriculum, and software) and Privatization (e.g. maintaining copyright for intellectual property, using proprietary software) will have an increasing impact on how we use the Internet. In some ways, this debate parallels earlier conflicts over the production and sale of music (e.g. Napster, iTunes) and pirated movies. In Canada, paying licensing fees and restricting use of journals and the ownership of course curriculum have become serious issues that have split the university community. But Rory McGreal and Leslie Chan cautioned that this issue is already starting to affect NGOs and Southern communities who want to distribute knowledge more widely.
- 4. Big Brother Is Watching You(Tube):** In the past few years, there have been many examples of repressive governments censoring and monitoring their citizens’ use of the Internet to crack down on democratization movements. But these concerns are not unique to the South: recent moves in North America to pass laws sanctioning further internet surveillance also raise some worrisome trends for civil society organizations, especially those whose work might be viewed as political.

## **F. Assessment**

We assessed the LF organization, design, and facilitation through a Participant Feedback Form and an After-Action Review by CP staff. The key findings include:

### **Planning**

Work on the LF started in July 2011 and required an extensive amount of work for CP staff and the external facilitator (e.g. through bi-weekly meetings). However, in retrospect, CP staff would recommend starting the planning process even earlier, to at least define the key parameters (e.g. dates, location, topic), involve local partners and do advanced publicity for the public event. In the future, a representative from IDRC's Communications and Event Planning teams should participate in more of the planning sessions. Another time, CP might also consider working more with provincial and regional councils for international cooperation to plan its LF.

### **Logistics**

The logistics (i.e. venue, transportation, accommodation, meals, audio, projection translation, finances) worked very well for the most part (thanks to Stacie, Carole, & Aida). The wireless internet connection worked well and allowed the participants to profile their VPs in "real time". However, more effective communication and outreach might have brought more people out to the evening public event. The interpreters for the evening event would also have preferred to have a written script (which the team had requested the speaker to submit) for the keynote presentation.

### **People**

The size of the group (30 people) was appropriate to support interaction and learning through dialogue. The LF brought together a great mix of people and organizations from many sectors who brought differing interests, sizes, mandates, location and levels of experience with VPs. This diversity made for a rich peer-learning experience in that those with more experience helped others; and everyone learned from different approaches to VPs & KM.

Conducting a pre-event survey in September of possible participants – both Canadian Partnerships grant recipients and others – helped the CP team shortlist the participants who would best benefit from and contribute to the LF. Hiring a skilled and experienced facilitator proved extremely valuable (given the small CP team), as did seeking local collaborators for publicity, participation and recruiting student volunteers .

### **Date & Time**

Holding the LF in February and during International Development Week meant it was a busy time for many participants. In terms of length, 1.5 days were sufficient to meet the objectives; but two days would have been better and allowed for more reflection. Adding an evening event on Tuesday was convenient from a logistics perspective, but

made for a long day. Future LFs do not necessarily need to be held in conjunction with a public event; they might be held at different locations and dates.

### **Place & Venue**

Hosting the LF in Winnipeg met one of the CP objectives of reaching out to Western Canada; but Winnipeg in February is cold and holding the evening event on the same night as an NHL hockey game may have affected turn-out as parking was limited. In retrospect, since International Development Week is primarily a university-centered event, holding the Forum's evening public lecture at the University of Winnipeg might have drawn a larger (student) audience but not necessarily a more varied slate of organizations.

The venue for the daytime workshop was a bit small and the layout (e.g. pillars) restricted the participants' movement and sight lines; another time, CP should ask for a larger room with more flexible space and natural light.

### **The LF VP – Ning**

Using a dedicated Virtual Platform (the Ning) before, during and after the LF was a congruent and cost-effective way to build community, disseminate information and archive various workshop products. However, as with any VP, the 1:9:90 rule applies, and participation levels were sometimes less than hoped for. Should CP decide to use a VP as part of another event, they should budget staff time for facilitating it via regular updates and blog posts.

### **Content**

The topic of VPs, KM and International Development proved to be relevant, timely and popular with CP's constituency. The response from most prospective participants was timely and enthusiastic, and the selected participants who attend the event were engaged and energized.

Commissioning Participant Reflection Papers with a simple template ahead of time was a good way to "jump start" the learning process and ensured that the panel presenters and conversants were well prepared. Accounting for papers, when presenting the substantive agenda of the Forum (e.g. communities of knowledge represented, knowledge needs expressed, key questions and common issues to be addressed throughout), values participants' investment in those papers and the value-added of face-to-face exchanges for collective reflective thinking. Finalizing some of the papers after the event, however, took more time than anticipated. In the future, CP might want to host a short "write-shop" for these authors immediately after the LF to finalize and synthesize their papers.

Michael Furdyk's two presentations profiled numerous innovative approaches to online collaboration using VPs. The extent to which TIG has leveraged VP technology to mobilize youth for social action was truly impressive, and opened up many of the

participants to the potential of VPs. Several participants mentioned that differentiation between the two presentations might have been better although several others commented that they appreciated a chance to hear the TIG story and technical tips a second time.

The LF's initial content focus was more on the technology of VPs and Knowledge Management. But several of the Participant Reflection Papers, as well as Luc's introductory comments, provided a helpful framework to situate VPs within an organization's KM strategy.

Having said that, several participants wanted time for more technical conversations on VP design; but given the diversity of the participants, the focus was appropriate. To meet this need, however, some participants suggested that CP should hold a second workshop or online forum that focuses on technical issues. Assessing the real-world development outcomes of VPs for KM is another issue that participants would appreciate learning about.

**Achievement-Based Objectives:**

The participants gave the following average scores / 5 on how well we met each of the LF's Objectives:

<b>Map</b> the types and uses of Virtual Platforms (VPs) in your work	4.0 / 5
<b>Share</b> experiences of how using VPs for Knowledge Management (KM) lead to specific development outcomes	4.6 / 5
<b>Distill</b> the best practices & challenges of using VPs for KM in International Development	3.7 / 5
<b>Foresee</b> the upcoming trends and developments in connectivity that could affect your VP	3.2 / 5
<b>Name</b> some potential modifications to your VPs to improve your results	3.7 / 5
<b>Suggest</b> how IDRC Canadian Programs can better support your work via VPs	3.2 / 5

NB: Some participants completed their forms prior to the learning tasks that spoke specifically to the last two objectives.

**Learning Design & Facilitation:**

Creating a detailed learning design helped to ensure congruence between the objectives and the process, and to support the participants to engage in more meaningful interaction, discussion and learning than typically happens at conferences. Having a well-designed program that CP staff supported provided space for the facilitator to adjust the program as necessary, in response to the participants' emerging learning needs and opportunities.

The participants were pleased with the variety of interactive and participatory learning tasks that supported learning through dialogue: traditional presentations, panel conversations, World (Internet) Café, individual reflection, etc. Intentional time for participant introductions and active networking during the initial warm-up task on Day 1 helped the participants to connect and made the subsequent peer-learning activities more successful.

The World (Internet) Café format *worked well because the VPs illustrated many of the issues we had been discussing in the morning and the diversity of the participants afforded rich exchanges. The format also allowed the guests to provide practical, informal feedback on their VPs to the hosts.* Another time, the facilitator suggests assigning a rapporteur for each table to ensure consistent quality of the record keeping. It would also have been great to have had additional time so that more participants could showcase their VPs and receive feedback.

The small-group learning-synthesis tasks on the last morning provided space for individual and group reflection on the learning, and a chance to identify ways that CP could support the participants in applying their learning. Even more time for this, however, would have been advisable. Requiring participants to complete their feedback form on the Forum as the “price of admission” to the final meal was an effective way of generating a high rate of response. 😊

### **Anticipated Transfer of Learning**

Detailed learning synthesis reports were provided by many participants to outline how they would apply their learning with their specific VPs; the participants consistently noted that participating in the LF would help improve their work and foster new collaborations, both with IDRC and with other partners.

## **G. Next Steps**

The LF Participants suggested the following next steps for the CP team:

### **Provide Technical Assistance or Learning on Technical Issues**

Several participants expressed a desire for more technical help in developing the technical / software sides of their VPs. (e.g. how to leverage 3<sup>rd</sup> party websites to enhance your VP). IDRC might want to fund another LF that specifically focuses on technical management issues.

### **Support for Future VP Development**

Other members expressed interest in partnering with IDRC to develop the next phase of their VP work. Small grants may be one way to facilitate this.

**Continue the Learning Forum Virtual Platform (via Ning).**

There was widespread support for continuing and expanding the IDRC LF Virtual Platform as a community of practice for participants in the LF to continue the rich peer learning that was supported in Winnipeg. There is a potential for the members to maintain the momentum of the VP, but assigning a CP staff person to moderate it would help leverage their contributions and help maintain this as a dynamic network. IDRC should also consider opening the VP membership to other survey respondents who did not attend, as well as others in the international development sector who work with VPs.

**Conduct a Tracer Study**

IDRC may also want to conduct a follow-up tracer study in a few months with a sample of participants to see how they have applied what they have learned at the LF.

## **Annex 1: Overview of Participant Reflection Papers**

In preparation for this LF, IDRC's CP invited eight participants to write a paper on their experiences of using VPs for KM. After the LF, we invited them to revise their papers in light of what they learned together. Here are the titles and abstracts of the seven papers received, and a short biography of the authors who took part in the LF. The full text of each paper is available online via the hyperlink in each title.

### **[Virtual Platforms at Athabasca University](#)**

by Rory McGreal, Jon Dron & Evelyn Ellerman with contributions from Darren Harkness, Terry Anderson, and Robert Heller. Athabasca University, Alberta.

#### **Abstract:**

Athabasca University (AU) is pioneering new approaches to online teaching and learning through a suite of VPs that connect academics, researchers and students around the world. Using a wide array of customized and publicly-available social networking tools, AU has developed a five-part VP that supports distance instruction, peer knowledge sharing and a dynamic online community of learning. Its experience demonstrates the importance of encouraging "innovators and enthusiasts" while not excluding others, and how the flat space of a network can be difficult in a more hierarchical, academic environment. It also illustrates the need for agile, organic software development that is responsive to the needs of the users. The paper concludes with some reflections on the pros and cons of open vs. closed networks, and a case study of how AU is working with partners in Papua New Guinea to maximize the potential of open education resources (OER).

#### **Biography:**

Rory McGreal presented this paper at the LF. He is a professor of Computer Technologies in Education at AU. He is also a UNESCO/COL Chair in Open Educational Resources. Dr. McGreal was previously the Executive Director of TeleEducationNB, a bilingual New Brunswick e-learning network. He has worked abroad in the Middle East, the Seychelles and Europe and has been honored with the Wedemeyer Award for Distance Education practitioner. Dr. McGreal researches systems and networks from technological, pedagogical and policy perspectives and how these work on mobile devices for M(obile)-learning.

### **[CEBEM's Experience in Promoting Innovation in Professional Development and Graduate Training](#)**

by Mario Torres, CEBEM

#### **Abstract:**

The Centro Boliviano de Estudios Multidisciplinarios (CEBEM) is a network that translates research results and practitioners' experience into online learning opportunities and constructs North and South communities of knowledge and practice.

This paper highlights how CEBEM has overcome challenges of distance, language, affordability and internet access to facilitate a wide array of professional development courses throughout Latin America using email, e-newsletters, Moodle and other social networking tools. CEBEM's partnership with Canadian academics and graduate students also offers a promising practice of South-North cooperation and learning, as well as connecting academics with development practitioners.

**Biography:**

Mario Torres is a sociologist and social demographer. He is a member of the Centro Boliviano de Estudios Multidisciplinarios (CEBEM) and Executive Director of CEBEM-International (Ottawa). He has extensive experience in coordinating regional research networks in Latin America and in promoting institutional partnerships. He currently coordinates the 'Cooperation, Knowledge and Development' (CKD) project [http://ccd-ckd.cebem.org/index\\_eng.php](http://ccd-ckd.cebem.org/index_eng.php). Dr. Torres brings over 30 years of international experience in developing projects in Latin America, in a variety of disciplines. [www.mariotorres.com](http://www.mariotorres.com)

**[The Equitas Community: An online community of practice supporting human rights education](#)**

by Julien Landry and Cristina Galofre, with contributions from Vincenza Nazzari  
Equitas – International Centre for Human Rights Education

**Abstract:**

Equitas launched the Equitas Community VP to serve as an online community for alumni of its International Human Rights Training Program (IHRTTP). The community supports educators and activists to do more effective human rights and human rights education (HRE) work. The Equitas Community follows the organization's KM strategy by using a participatory approach to draw upon the participants' existing knowledge and experience. This paper profiles some of the outcomes of the VP over the past six years, including: strengthening networks and relationships, sharing information, sharing and applying knowledge (transfer of learning) and changing perspectives, attitudes and values of human rights educators and defenders. The analysis suggests that despite some trade-offs, the community has been a worthwhile investment for Equitas. Participation in the LF generated further reflections that will inform its work going forward, including: the importance of trust, realistic expectations and fostering a greater organizational culture of knowledge building and sharing.

**Biography:**

Cristina Galofre presented this paper at the LF. She is an Education Specialist who administers the online *Equitas Community*. During an internship at Equitas in 2008, she developed and evaluated a pilot version of a Human Rights Education Design e-workshop. Cristina holds an M.A in Educational Technology from Concordia University. Prior to joining Equitas, Cristina worked in Colombia developing projects related to the educational use of information and communication technologies.

**[Barza: A social networking site for African farm radio broadcasters](#)**

by Nelly Bassily and Blythe McKay, Farm Radio International

**Abstract:**

Farm Radio International (FRI) is a non-governmental organization that supports broadcasters who use rural radio broadcasts to small-scale farmers in sub-Saharan Africa. “Barza” is a recently-launched, online community where broadcasters across the continent can share ideas, scripts and other tools. This paper illustrates how FRI is supporting peer-learning through a dedicated, social network for professionals and the potential of VPs for knowledge creation, sharing and production. Their experience also illustrates how “new media” (online VPs) can complement “old media” (radio) to create interactive learning opportunities that are accessible to local people even in remote areas. As the potential for mobile computing in Africa grows, FRI is considering the cost-benefit of extending the Barza community to smartphone users.

**Biography:**

Nelly Bassily works as a research and production officer at FRI in Ottawa, Canada. She studied journalism and communications at Concordia University in Montreal. She has previously worked on media, advocacy, training and development projects in Benin, Burkina Faso and Egypt. Nelly speaks English, French, Arabic, Spanish and Portuguese.

**[Knowledge platforms and local-level knowledge sharing](#)**

by Heather Creech, Director, Global Connectivity, International Institute for Sustainable Development. With case study contributions from Michelle Laurie, Ben Akoh and Leslie Paas

**Abstract:**

The International Institute for Sustainable Development (IISD) advances policy recommendations and uses communication technologies to promote sustainable development. Using the Internet, IISD reports on international negotiations and shares knowledge from collaborative, global research and development projects. This paper, however, focuses on how locally-generated knowledge can be shared at the community level and it provides three case studies of how local actors are using traditional and online approaches. It identifies eight lessons from local knowledge sharing that are also applicable to web-based knowledge management, as well as further reflections after the IDRC LF.

**Biography:**

Heather Creech is the Director of Global Connectivity at IISD, responsible for the delivery of IISD's program of work on how technology, in particular communication technology, is supporting and changing how we organize our governing systems, our economies and our cultures in unprecedented ways. She brings to her work extensive experience in Canada and the South Pacific, establishing networks and providing information and training services in the legal and marine science fields.

**[Knowledge Sharing and Development Cooperation through Virtual Platforms](#)**

by Carol Tisshaw and Incia Zaffar, Save the Children.

**Abstract:**

As an international network of 29 development and humanitarian-response member organizations, Save the Children has been using VPs to preserve and nurture the knowledge throughout its network and programs in 129 countries. This paper highlights three examples of VPs that Save the Children uses in its KM and collaboration work: the Thought Cabinet, the Child-Protection Working Group, and the Community Child Protection Exchange Forum. The author notes the importance of starting small, and growing organically in response to user needs and initiatives, as well as the challenges of internet-connectivity and user-capacity.

**Biography:**

Carol joined Save the Children Canada in 2005. Her current role is Manager of Administration and Special Projects. Previously, in a variety of management roles at TVOntario (a public broadcaster) for over 14 years, Carol led the development of a range of educational resources for children and their mentors. Her last role there was as Manager of Content Development for several Independent Learning Centre web resources.

**[Use of Virtual Platforms for Knowledge Management and Sharing: the experience of Cuso International in Latin America \(KEDLAP Project\)](#)**

by Kate Roberts (Cuso International) & Edgar Pabón (CEBEM). KEDLAP Project Co- Coordinators

**Abstract:**

This paper documents the experience of Cuso International and CEBEM in managing a VP for the KEDLAP (Knowledge for Effective Development Learning and Practice) program in Latin America. It illustrates the importance of embedding the VP's objectives, functions and supporting tools within a wider KM strategy, and how successful VPs require extensive technical and content support and facilitation. The paper concludes by citing some of the development and learning outcomes that the program achieved.

**Biography:**

Kate is currently the Regional KM and Programme Development Officer for Cuso International's Latin America and Caribbean Programme. Kate has 20 years experience working with international development NGOs in Latin America, 15 of them with CUSO/CUSO-VSO/Cuso International. Postgraduate studies in Development Programme and Project Evaluation, and a keen interest in participatory methodologies, led her into the field of KM and sharing for development. Between 2009-2011, she coordinated a pilot KM and sharing project, KEDLAP, funded by IDRC.

**Annex 2: List of Learning Forum Participants**

<b>Name</b>	<b>Title</b>	<b>Organization</b>	<b>Website</b>
Michael Furdyk	Co-Founder / Executive Director/ Director of Technology	TakingItGlobal	<a href="http://www.takingitglobal.org">http://www.takingitglobal.org</a>
Cristina Galofre	Education Specialist	Equitas	<a href="http://www.equitas.org">http://www.equitas.org</a>
Nelly Bassily	Research and Production Officer	Farm Radio International	<a href="http://www.farmradio.org">http://www.farmradio.org</a>
Rory McGreal	Professor	Athabasca University	<a href="http://www.athabascau.ca">http://www.athabascau.ca</a>
Mario Torres	Member	CEBEM	<a href="http://www.cebem.org">http://www.cebem.org</a>
Kate Roberts	KM and Program Development	CUSO-VSO (KEDLAP)	<a href="http://www.cusointernational.org">http://www.cusointernational.org</a>
Leslie Chan	Professor/ Web designer for CCUPIDS, Bioline	University of Toronto	<a href="http://blog.utoronto.ca/idsprog">http://blog.utoronto.ca/idsprog</a>
Heather Creech	Director, KM	International Institute for Sustainable Development (IISD)	<a href="http://www.iisd.ca">http://www.iisd.ca</a>
Carol Tisshaw	Director of Programs	Save the Children Canada	<a href="http://www.savethechildren.ca">http://www.savethechildren.ca</a>
Alden Braul	Capacity Development and Food Security Coordinator	Canadian Foodgrains Bank	<a href="http://www.foodgrainsbank.ca">http://www.foodgrainsbank.ca</a>
Aniket Bhushan	Researcher	The North South Institute	<a href="http://www.nsi-ins.ca">http://www.nsi-ins.ca</a>
James Gaede	Communications Coordinator	CASID	<a href="http://casid-acedi.ca">http://casid-acedi.ca</a>
Erin Hetherington	Research Associate, Global Health and Partnerships Faculty of Medicine	CCGHR	<a href="http://www.ccghr.ca">http://www.ccghr.ca</a>

	University of Calgary		
Lama Boughaba	Adjointe administrative	Oxfam Quebec	<a href="http://www.oxfam.qc.ca">http://www.oxfam.qc.ca</a>
Chantal Havard	Government Relations and Communications Officer	Canadian Council for International Cooperation	<a href="http://www.ccic.ca">http://www.ccic.ca</a>
Paule Gagnon	Directrice aux communications	Institut Nouveau Monde	<a href="http://inm.qc.ca">http://inm.qc.ca</a>
Budd Hall	Secretary of GACER	Knowledge Commons/GACER	<a href="http://www.communityresearchcanada.ca">http://www.communityresearchcanada.ca</a>
Janice Hamilton	Executive Director	Manitoba Council for International Cooperation	<a href="http://www.mcic.ca">http://www.mcic.ca</a>
Diana Coumantarakis	Outreach Coordinator	Alberta Council for Global Cooperation	<a href="http://acgc.ca">http://acgc.ca</a>
Samuel Sawatzky	Computer Services Manager	Mennonite Central Committee	<a href="http://mcc.org">http://mcc.org</a>
Paul Little	Dean, School of Innovation	Red River College	<a href="http://www.rrc.mb.ca">http://www.rrc.mb.ca</a>
Ray Vander Zaag	Director, School of International Development	Menno Simons College	<a href="http://www.mscollege.ca/ids.html">http://www.mscollege.ca/ids.html</a>
Helene Duquette	Team Leader, Women's Rights/KM officer	Canadian Crossroads International	<a href="http://www.cintl.org">http://www.cintl.org</a>
Mara O'Brien-James	Director, KM & Organizational Development	Care Canada	<a href="http://www.care.ca">http://www.care.ca</a>
Brad Vincelette	Web Software Developer IISD Reporting Services	International Institute for Sustainable Development (IISD)	<a href="http://www.iisd.org">http://www.iisd.org</a> <a href="http://climate-l.iisd.org">http://climate-l.iisd.org</a>
Bill Glanville	Vice President	International Institute for Sustainable Development (IISD)	<a href="http://www.iisd.org">http://www.iisd.org</a>

Ann Weston	Director, Special Initiatives Division	International Development Research Centre (IDRC)	<a href="http://www.idrc.ca">http://www.idrc.ca</a>
Luc Mougeot	Senior Program Specialist	International Development Research Centre (IDRC)	<a href="http://www.idrc.ca">http://www.idrc.ca</a>
Claire Thompson	Program Management Officer	International Development Research Centre (IDRC)	<a href="http://www.idrc.ca">http://www.idrc.ca</a>
Loredana Marchetti	Senior Program Specialist	International Development Research Centre (IDRC)	<a href="http://www.idrc.ca">http://www.idrc.ca</a>
Stacie Travers	Research Award Recipient	International Development Research Centre (IDRC)	<a href="http://www.idrc.ca">http://www.idrc.ca</a>
Dwayne Hodgson	Learning Designer & Facilitator	<a href="http://learningcycle.ca">learningcycle.ca</a>	<a href="http://www.learningcycle.ca">http://www.learningcycle.ca</a>