



# Connect the Dots

## Our response to COVID-19

*\*As of April 22nd 2020*

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# Connect the Dots

## Our Perspective

The level of trust in a society, both interpersonal and in institutions is a key influencing factor for how well that society functions. The wellbeing of citizens, good governance and economic growth are driven by high levels of trust. During the current COVID-19 crisis both in the US and on a global level, trust matters even more than ever. We need trust in our communities to support us when we are at our most vulnerable physically and psychologically. We need to trust in our government and political institutions to ensure that essential guidelines are followed and emergency measures from healthcare to direct social protection are put in place to protect us. We need trust in mainstream media for primary and secondary sources of information we can rely upon. We need trust in civil society organizations for expert support, focused advocacy and creative, collaborative problem solving to move us forward.

**We believe that the careful engagement of all key stakeholders, in a collaborative, thoughtful way is critical when forming solutions to the challenges we are facing. Now more than ever, we value listening and collaboration as a driver of trust. We want to continue to build solutions that embed a sense of belonging and commitment in communities, where people know that their voices matter. We want to be part of solutions that resolve problems, not that create them. We want to collaborate on projects where this trust is valued and cultivated.**

As a firm that specializes in stakeholder engagement and the co-creation of solutions, we will be leveraging our expertise and insights from local, regional and national projects in Ireland and the US (East Coast), with public, private and civil society organisations including Dublin City Council, the National Transport Authority, the Congress of Ireland, Comcast NBC Universal, Independence Blue Cross, Center City District Philadelphia, DBFL Engineering, Hibernia REIT, Meath County Council, and more. **We strongly believe that during this uncertain and unprecedented time, forging connection has become even more important. It is possible to continue to engage and we must do so in a collaborative and inclusive manner, exploring, learning and iterating as we go. This is how the most robust and resilient solutions are found: together.**

Up until mid March 2020, the majority of the projects we engaged with involved a number of face to face elements designed to form key insights to enable more informed decision making and problem solving. We have since been piloting innovations in the remote delivery of such stakeholder engagement processes, which we believe will ensure that we can continue to enable high quality engagement in line with our core values. Within this, we are working on developing strategies to bridge the digital divide, as this crisis is highlighting inequalities more now than ever.

**We will be detailing progress of these pilots and our collective learnings here and on our website ([connectthedotsinsights.com](https://connectthedotsinsights.com)) in the coming weeks. We hope they will prove useful to you during these times.**

# Our Shared Challenges

From our calls with members of our network to the virtual support and problem solving workshops we've been hosting, we've seen:

Need for adapted strategies for working with and supporting our network (whether they be clients, stakeholders, partners, etc), during this time

Pressure to reimagine or shift services, key tasks, operations, events, meetings, conferences to fit in this new virtual environment

Necessity to balance meeting urgent demands with longer term planning - alongside navigating so many unknowns

Importance of reimagining engagement processes and ensuring stakeholders are brought along in the process

Difficulty / reticence to highlight or keep core issues on the agenda (ie climate change, accessibility) that are not COVID-19

Need to ensure equitable engagement especially regarding community consultation and the digital divide

# Some Silver Linings

From our calls with members of our network to the virtual support and problem solving workshops we've been hosting, we've seen:

An increase in partnerships and collaborative approaches

More cross-sectoral collaboration, a critical factor in building community resilience

A spirit of openness and transparency

Creativity and innovation supporting the way forward during such challenging times

A more personal touch to typical business interactions; professional veneers are coming off a bit more enabling people to engage

# Productive & Meaningful Engagement

## *a value-based framework*

Our insights on a framework for approaching engagement during the time to ensure value and impact.

### **1. Empathy: Being open to the evolving and varied needs of your stakeholders in order to adapt responses and solutions in a humane way**

- Step back and evaluate, ask individual questions to learn about needs / situations / challenges / comfort with tech
- Openness to re-adapting topics / modes of engagement accordingly
- Understanding that not everyone will have the capacity to engage in the same way as before / as one another. This could change daily or weekly, so offer varied types and levels of engagement to allow a range of input
- Consistently check in to ensure relevance, meaningfulness, and impact

### **2. Transparency: Open, accessible, clear, two-way communications - building trust is at the core of keeping stakeholders connected and engaged**

- By providing open updates on your work, stakeholders will feel respected and in the loop
- Demonstrating two-way communication is essential, since most communication right now is top down
- Allow for, and solicit feedback (both anonymous and direct) to reflect upon and improve your own engagement methods

### **3. Collaboration leads to innovation; innovation to resilience**

- Stakeholders deserve a chance / opportunity to build into the process, which most often results in a better project
- Including stakeholders in the idea development process leads to buy-in and deeper participation going forward
- Collaboration leads to innovation and more resilient solutions
- When virtual work feels limited, build in more opportunities for collaboration
- Connect people across networks and break down silos by facilitating diverse groups, identifying common goals, and bringing people together in a comfortable, shared space.

### **4. Creativity: No two processes are alike because no two communities are alike. Complex problem solving requires creative solutions.**

- Combine tools to maximize productivity and participation. It is important to create spaces and avenues that enable all types of individuals to be heard, be engaged, and feel at ease participating. That's why at Connect the Dots, we recommend utilizing a variety of tools. Within a single activity, such as a virtual workshop, you can call upon tools that serve to engage all learning and participation styles. Address auditory participation with presentations and video via Zoom; visual with images, diagrams, and graphic collaboration with tools like Mural; reading/writing with Google Docs; kinaesthetic with polls and voting via Sketchboard
- Recreate moments of personalized social interactions: recreate watercooler moments online by allowing more time for connection in the beginning of meetings
- Mix virtual and non-virtual tools: follow up a presentation with a phone call, or send a thank-you note by mail
- No matter what types of tools you choose to mix together, the whole process needs to be facilitated thoughtfully. Practice the integration of tools and employ good hosting behaviors.

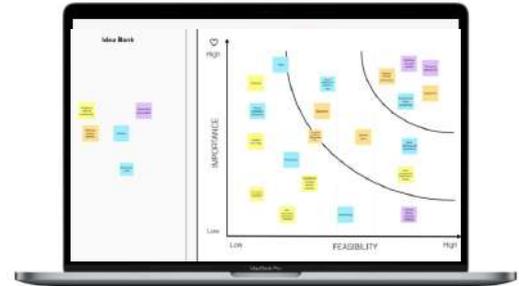
# Tools we Recommend for Engagement during COVID-19



## Zoom

### *for group video and break-out sessions*

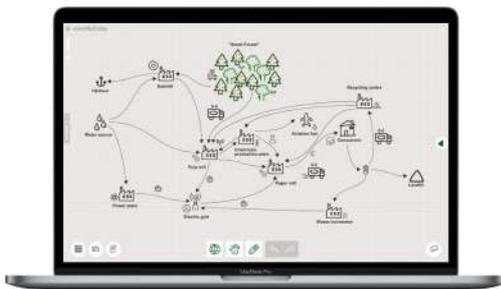
First on our list is Zoom. We were open to using other primary tools for our calls large and small but we keep going back to Zoom. After over 2 weeks at home, a large number of people are becoming Zoom-literate who were not before. The stand-out tool for us is virtual breakout rooms, which helps recreate a small workshop or meeting environment with large or smaller groups. Like in an in-person workshop, we found it works best when you structure who is in each the break-out group ahead of time. You can run Zoom in conjunction with other tools below such as Mural which we are doing now. In addition, through Zoom you can share your screen and show presentations and videos. You can also change your background if you want more privacy (see [canva.com](https://www.canva.com) to get Zoom Virtual Background templates). We just piloted the voting function and found it useful. **Teams** is another tool that enables group video chats but not break out rooms. However, we found it more personable in that it allows a presentation and its presenter to be seen at the same time.



## Mural

### *for collaborative worksheets*

This is one of our favorites so far. It creates an online virtual collaboration space - essentially a recreation of a table at a workshop with worksheets to go through. It's easy to use, comes with lots of worksheet templates (plus we've been working on translating our own templates to this). It also allows you to post stickies, share ideas, brainstorm, and more. We found it visual, interactive, and colorful. A nice quality as well is that anyone with link can collaborate (no registration barrier). We have found that it's essential to give everyone a quick demo for Mural before the session proper starts. If everyone can write their name on a post it, they are good to go. Offer opportunities to engage via WhatsApp or text to send comments which a facilitator adds to the Mural during a session. If not, you may risk losing people early on if they suffer a tech-block.

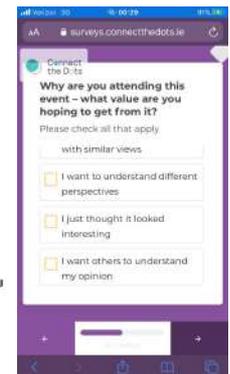
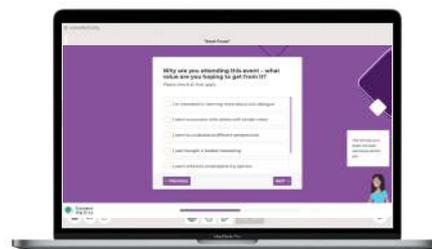


## Sketchboard

### *for sharing and collaborative commenting on plans, designs, images and more; also for brainstorming*

This platform gives you a great range of flexibility - and is particularly useful in terms of enabling groups to comment together on plans, maps, images etc that you can put directly on the 'sketch board.' Free form drawing is allowed to - with support from options of icons, arrows, etc from the platform.

An even simpler version of this could be a Google doc or Google slides too; both allow for live collaboration.



## Engage

### *for accessible and community-driven surveys*

Engage is our survey platform, and is designed to be more accessible, playful, and engaging and user-friendly than other such platforms. For example, support and encouragement for participants are provided throughout to encourage participants to feel comfortable and confident when filling out the survey. Additionally, throughout the survey, there are elements including visualizations of other respondents' answers, that reimagine the traditional survey into a communal experience (rather than a vacuum).

# Tools we Recommend for Engagement during COVID-19



## Mentimeter

*for polling and immediate surveys to enable interactive meetings via phone and online*

Powerful immediate feedback / survey tool through phone, for more interactive meetings. It also visualizes answers for people to discuss live (via Zoom, etc) or to be included in reports.



## Engage HQ or Social Pinpoint

*for a variety of community engagement tools in one platform*

These are wide-ranging community engagement platforms which allows for collaborative mapping, ideas wall, open forums, surveys, and more. This can work for a variety of projects including but not limited to transport, planning, parks, environmental. However, this platform needs a deeper level of understanding of the tool and thus requires strong familiarity before customizing it to the project.



## Miro

*for online collaborative white boards and idea walls*

The online collaborative white-boarding platform to bring teams together, anytime, anywhere. Beautiful, but need to register for access. Good for smaller workshops. Flimg also works well for this - particular as post-it boards that can also be pre-designed. Forumbee is also an option but more expensive. We found Flimg and Forumbee have similar capabilities to Miro, but people need to register their emails. All can also stay up between engagements to keep the discussion going.

Zoom can also do whiteboards but we recommend these specialized platforms.

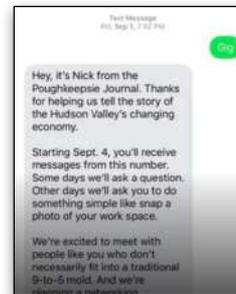
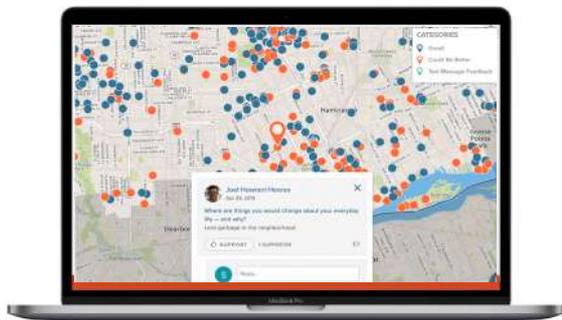


## Facebook Live (with Crowdcast)

*for accessible and interactive communications*

While these new platforms offer strong benefits, there is something to be said for leveraging what already exists too. Many people already have and are comfortable with Facebook so we also recommend 'meeting people where they are' and engaging via Facebook groups and Pages and video chats. Facebook Live is particularly useful as it allows you to live-broadcast presentations, panels, meetings, and the like. This is already being used as a tool to reimagine religious services. However, to make it more interactive, we have found out that you can use it in conjunction with the Crowdcast platform to enable Q & A, chats, and polls and even invite attendees on screen.

# Tools we Recommend for Engagement during COVID-19



## CoUrbanize

*for virtual tours of places and gathering feedback via collaborative mapping*

This is a really helpful tool as it allows you to give virtual tours of physical places - and you can collect feedback from participants along the way. Community members are, after all, the experts of their own neighborhoods - so tours like this (even if virtual) are still incredibly useful in gathering helpful insights and developing shared understanding of place. Other platforms that others in this space are looking at as well are Storymap, Google Tour Creator, Historypin, among others.

## Groundsource (or Reach)

*for gathering perspectives on the ground via two-way text messaging at scale*

This is a non-virtual tool but is particularly important as it allows you to meet you community where they are at. It enables two-way texting messaging en masse. We find it useful that you can segment and build lists, automate two-way branching conversations, and engage people one to one, or one to many, depending on the scale and personalization needed.

## Additional non-virtual ideas to help bridge the digital divide:

It is critical that we still leverage a mix of engagement tools, especially via different media, in order to ensure that we reach vulnerable communities and those not connected in or comfortable virtually. Here is a snapshot of ideas that we've been gathering; we will be updating this over the coming weeks.

- Community call-in radio show; radio ads for outreach
- WhatsApp (including for group video chat via phone or just regular chat groups; Zoom can also be a phone app)
- Outreach and installations with QR codes at nodes of key concentration (ie grocery stores)
- Traditional 1-1 phone calls or small group conversations via phone
- Connection and collaboration with community ambassadors / representatives to reach more people (leveraging key 'messengers' already trusted within communities; this could be done in conjunction with training to enable capacity building)
- Mailing letters, surveys; potential for slot to put surveys in that follows health guidelines
- Podcasts
- Via community nodes such as teachers, youth workers, community groups, churches, etc.

# How to Apply these Tools *makes all the difference*

Based on our piloting of all the tools above, there are some key practical insights that apply in almost all cases to particularly ensure that your stakeholder sessions / meetings / workshops run smoothly.

Here are our top 10 tips so far:

- 1. Mix and match tools together to maximize productivity and participation.** It is important to create spaces and avenues that enable all types of individuals to be heard, be engaged, and feel at ease participating. That's why at Connect the Dots, we recommend utilizing a variety of tools. For example, even within one method like a virtual workshop, you can integrate elements to engage all learnings and participation styles (*auditory* with presentations and video via Zoom; *visual* with images, diagrams, graphic collaboration tools like Mural); *reading/writing* with Google Docs, pre-session materials; *kinaesthetic* with polls, voting, Sketchboard).
- 2. The lead up to the workshop sets you up for success.** The change over to virtual workshops is quite new to people so it's important to help each attendee feel prepared and comfortable to engage. From a tech standpoint, this includes ensuring people have the opportunity to get used to the tech beforehand. What we found useful, in addition to providing demo videos, was offering brief 1-1 coaching beforehand and even virtual facilitation training too to give the opportunity for participants to help facilitate, thereby building their confidence and capacity. From a communications standpoint, it is important that your pre-workshop communications are very clear and the instructions are easy to follow. We found that short emails work best with the relevant links (such as to Zoom) in an obvious spot. You can share the collaborative worksheet links once you're in the call itself. At Connect the Dots we strongly believe in gathering insights beforehand so you can better match needs and expectations. So we always send out a pre-workshop survey and also try to do a focus group beforehand. This not only helps give participants a voice in shaping the session but you get to better understand their needs, interests, experience level with tech and their likelihood to attend.
- 3. Tech support is critical.** You cannot facilitate a large session and problem-solve tech issues at the same time. Someone who can support individuals to get back onto the call if they drop off, communicate if their microphone goes or just get them up to the speed of the rest of the group quickly is essential. You don't need an expert, just someone with a bit of patience to work through problems as they come up. Find an additional way to communicate with each other; stay on WhatsApp or text on the side in case anything comes up.
- 4. Provide other ways for communication during a virtual workshop beyond video.** Set-up some easy alternatives in case there are unfixable communication problems with one or more participants, or if participants would prefer to contribute in a more anonymous way. If you have mobile numbers of the group at hand, tech support can WhatsApp or text a participant in a session who can't or is having trouble actively take part - and bring their comments into the discussion. Or alternatively, you can add them to the session notes afterwards. Quick voice comments via WhatsApp can also be included in the discussion live or added afterwards.
- 5. Ensure you have strong facilitation.** Just because it is a virtual workshop, it doesn't mean that facilitation isn't as important. In fact, we have been finding it even more critical. We recommend having one facilitator per breakout room - and pairing that ideally with one notetaker too who is supporting the collaborative worksheet (ie on Mural). Like in a large-scale workshop, the main host of the whole session can also move from breakout room to breakout room to check in. Key facilitation techniques for virtual workshops include: Limit non-stop speaking to 10 min or less; Clarify roles and responsibilities; Have shared space for materials; Use warm ups; Have a way to help people take turns speaking and draw out quiet ones; Provide a way for participants to write down personal thoughts; Maintain a time cap.

# How to Apply these Tools *makes all the difference*

- 6. Account and plan for additional exercises to strengthen social bonds.** Building and strengthening social bonds between workshop participants helps to support stronger collaboration. This is of course harder to do virtually so we recommend spending some extra time and effort on this. This could translate to longer warm-up activities or reflection questions, a separate session focused on getting to know each other or short collaboration exercises. Allowing for slightly longer warm up activities also gives participants the opportunity to get more comfortable with the technology.
- 7. Set a safe, open, comfortable tone for your workshop in the introduction.** We always recommend a round of introductions at the beginning of any session and in the current climate including a warm up question of sharing something that made you happy this week is especially pertinent. We also set the ground rules here as it's important to have a general baseline for interactions. At the onset, review the tech being used (Zoom and for example, Mural) and give people the opportunity to test out the functions and ensure they are comfortable. This is also a way to test microphones and make sure everyone is ready and able.
- 8. Work to capture feedback to help improve your next workshop.** It is important to remember that this is all a work in progress, as we all grapple with new tools and ways of working together. That's why we find it very important to always ask for feedback, reflect on what worked and what didn't, and document our learnings. One way we collect feedback is through our Connect the Dots 'Engage' platform which can be integrated within the Zoom meeting or via email immediately afterwards. We always recommend communicating back to participants as it demonstrates how their perspective is listened to and valued, which in turn builds trust.
- 9. Follow generic best practice for group video calls.** Some tips that we have gathered include the following. Keep your face in the direction of the microphone and speak forward. It can be distracting to have the mic go in and out. Make sure your face is entered and the background is clear and not distracting (you can even create your own background on Zoom if you don't want to show your home). Maintain professionalism but with an especially friendly air. When facilitating, you can have people raise their hands and be called on as otherwise people may cut each other off accidentally especially if there are lags. We also found it is best to ask people to stay on 'Mute' until they want to talk as otherwise there may be distracting background noise coming through. From a privacy standpoint, include a password to enter into your call.
- 10. Don't forget to be a great host.** Flexing your hosting muscles is even more important when your guests enter the virtual space of your meeting. Preparing the event as though it is a live event, taking into account all of the ways people should feel welcome, comfortable, confident, and appreciated, is a good way to approach online meetings. Some people may feel even more out of their element when they enter a floating-faces chat room, so set the tone for friendly interaction by making introductions, preparing casual ice-breakers, giving people ground rules, and taking gentle control of the room. People will feel comfortable knowing that you have a handle on the meeting, and will be better suited to productive discussion.

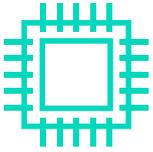
# Support from Connect the Dots

What we're doing to contribute  
and support



# Engaging and Managing Stakeholders

We are providing:



## Solutions

Digital re-imagining of engagement processes and events - along with approaches to bridge the digital divide



## Support

Strategic sounding board and thought partner - specifically on engagement, risk management, communications and remote engagement options



## Management

Stakeholder management and engagement - from high level stakeholders to community / volunteers - to help build and maintain trust, and support the sharing of insights, best practices, and ideas

# Making and Measuring Impact

We are providing:



## Defining Impact

Development of impact measurement frameworks and relevant KPIs



## Tracking of Data

Expertise and insights on tracking change, evaluating and measuring impact, monitoring agreed KPI's, post engagement follow ups, an end-to-end understanding and project continuity



## Survey Platform

Use of our custom-built 'Engage' platform for surveying in a community-driven, accessible manner

# Building Resilient Solutions

We are providing:



## Engagement

Engagement of 'end-users' (stakeholders) to ensure their voice is heard and their insights feed into the development and planning process; giving the opportunity for them to 'build in' to the initiative or project will drive their 'buy in' and involvement



## Support

Support in developing steering committee and multi-stakeholder apparatus to enable productive collaboration amongst key stakeholders and partners



## Facilitation

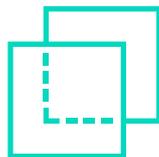
Strategic design and facilitation (via unbiased third party) of meetings including visioning / brainstorming / workshop / design thinking sessions to ensure the end result is as robust as it can be; teasing out & overcoming challenges, and driving effective collaboration and management throughout the process



## Partnerships

Expertise in identifying key stakeholders, engaging with them, bringing them to the table, developing a common platform, building out key roles.

Developing partnerships to ensure success, filling gaps where needed and managing risk and expectations of all parties



## Communications

Transparent communications (that also manage risk and expectations) throughout.

In relation to this, we provide high quality graphic design and branding of projects, actions, initiatives to ensure people feel a true connection to it and a part of it



## Collective Problem-Solving

Collaborative development of creative, inclusive ideas to attract and engage your stakeholders; support to find creative ways to engage with communities and ensure the project runs successfully

**Thank you.**

We are committed to playing our part in preparing solutions to this crisis through connecting the dots and collaborating with inspiring organizations and people like you.

**Connect with us at  
[hello@connectthedotsinsights.com](mailto:hello@connectthedotsinsights.com)**