National Trust for Historic Preservation Virtual Engagement Toolkit
(June 8, 2020 Draft)

Community engagement is about working collaboratively with a range of stakeholders, through an exchange of information and resources, to identify and address preservation-related issues affecting the community. This could include getting community input on the future of a local landmark, inviting public feedback on proposed preservation planning tools, or resolving conflicts between opposing viewpoints for a local preservation matter. It’s a vehicle for bringing about change to help build consensus around a shared vision reflecting the needs of residents, property owners, local government and other stakeholders. By working with and listening to the community, a public-interest organization can use community engagement collaboratively to create and realize a shared vision for the future.

Whether because of a shelter-in-place order due to COVID-19, because of a limited travel budget, or just wanting to reach out in different ways, historic preservation organizations across the country are looking at new ways to create virtual connections with members, partners, constituents, and other stakeholders on a broad range of preservation issues.

The toolkit includes guiding principles to ensure virtual outreach is successful and step-by-step recommendations to guide the development and implementation of each individual effort. A chart identifies different virtual tools for a range of outreach activities and programs, along with pros and cons for each. Some tools are better suited for activities where the goal is to engage stakeholders while others are better suited to inform stakeholders. Some serve both functions, by providing information and then allowing for questions or feedback.

GUIDING PRINCIPLES FOR VIRTUAL ENGAGEMENT

PRINCIPLE ONE: Establish trusting relationships. If you are reaching out to a new audience where a trusting relationship is not yet established, work with a partner who has an existing relationship with your target audience. Ask your partner to reach out and serve as the host for initial meetings to increase the comfort level of your audience and to encourage participation.

PRINCIPLE TWO: Consider a larger number of smaller meetings when engaging virtually. When conducting community engagement remotely, start with smaller groups. Starting with a large group can be difficult, smaller groups can be a more effective way to begin engagement. For example, replace a small group in-person meeting with 1:1 phone calls.

PRINCIPLE THREE: Use technology that works for your audience. Consider the comfort level and access to technology (including access to high-speed internet) your audience has in choosing how to connect. Even if you can do video conferencing, you won’t not be effective unless your audience is comfortable using those platforms. Check in with local partners to identify barriers to remote communication of which you may not be aware.

PRINCIPLE FOUR: Start small and build from there. An engagement campaign might begin with a small interaction such as an online survey or a phone call. A longer, ongoing relationship may use multiple tools, progressing to engagements that require greater participant commitment.

PRINCIPLE FIVE: Provide incentives as appropriate. While a heartfelt “thank you” may be sufficient reward for some engagement activities, for more time-intensive engagements such as a focus group, consider a small incentive or gift to ensure thoughtful participation by the right audience.
STEPS FOR SUCCESSFUL VIRTUAL ENGAGEMENT

STEP ONE: Identify what you want to accomplish and the best engagement tool(s) to connect with your desired audience.
The chart below describes a range of tools you can use for different types of remote community engagement to reach your targeted audiences. Your community engagement may be a single activity or a longer campaign that uses different remote engagement tools over time.

STEP TWO: Identify who your target audience is.
Consider who you are trying to reach to accomplish your goal. Once you know who your target audience is, you’ll need to secure contact information or a partner who can contact potential participants. Email can be an easy way to connect, but you may also want information about the technology(ies) your target audience is familiar with or has access to.

STEP THREE: Invite participants and schedule engagement activity.
Think about the best way to invite participants as well as who the invitation should come from. Consider using a tool like Doodle to find a date and time when a group of individuals are available to meet. Tools like Eventbrite allow participants to RSVP or sign up for a specific time. Include personal phone call invitations or reminders for high-priority audiences that are harder to engage. Consider sending out an agenda or discussion questions in advance.

STEP FOUR: Host virtual community engagement activity.
To make virtual community engagement activities as effective as possible, be sure your audience has a clear understanding of what you are trying to accomplish. In addition to a designated facilitator, assign a notetaker so you can capture information that is shared, or consider recording with the consent of participants.

STEP FIVE: Thank participants and evaluate results.
Be sure to send a follow-up thank you to everyone who participated in your remote community engagement activities. Take an opportunity to share key findings and next steps with participants. Consider what you were able to learn or achieve and how you can learn from your experiences to inform future outreach efforts.
<table>
<thead>
<tr>
<th>Virtual Engagement Tools</th>
<th>Best for:</th>
<th>Pros:</th>
<th>Cons:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Invitations, Outreach, Sharing info</td>
<td>Familiar for most users, Can use listservs to reach larger groups (e.g., advocacy alerts)</td>
<td>Emails can be overlooked if users receive high volume of email</td>
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<tr>
<td>Phone</td>
<td>1:1 interview, Small group interviews, Oral Histories</td>
<td>Familiar for almost all users, Some can be recorded with express permission (e.g., oral histories), 1:1 or small group may be easier than large group for remote engagement, Participants more willing to be candid</td>
<td>Securing phone numbers, Scheduling calls, Limited data plans are barrier for some, Lack of visual connection can be challenging, Need to secure permission if recording</td>
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<tr>
<td>Conference Call</td>
<td>Call with 3+ participants</td>
<td>Availability of free conference call services, Fairly easy for all to access via phone</td>
<td>All cons above for phone calls, plus reluctance to be candid when in a larger group</td>
</tr>
<tr>
<td>Mail</td>
<td>Audiences lacking access to tech</td>
<td>Mail can reach everyone</td>
<td>Expensive and time consuming, Requires having address list, Responses can require recipient to pay postage</td>
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<tr>
<td>Public Exhibit</td>
<td>Raising awareness and sharing information</td>
<td>Public art, banners or other site specific installations can be viewed over time while social distancing</td>
<td>Less interactive with fewer opportunities to gather feedback or generate ideas</td>
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<tr>
<td>Virtual Town Hall</td>
<td>Outreach to large groups</td>
<td>Potential to reach very large audiences, Automated phone reminders</td>
<td>Cost to set up, Phone based (audio only)</td>
</tr>
<tr>
<td>Online Survey/Petition/Poll (e.g. Survey Monkey, Doodle, Instagram, Twitter, change.org, Poll Everywhere)</td>
<td>Survey (online), Petition, Sign-on Letter, Voting (online)</td>
<td>Efficient way to reach many people, User friendly, Easy way to reach anyone with email (Survey Monkey or Doodle), Easy to analyze data</td>
<td>Need email addresses, Getting responses, Set up requires familiarity with platform, Limited functionality without a paid account (Survey Monkey), Requires social media account (Instagram, Twitter)</td>
</tr>
</tbody>
</table>
| **Video Call** (e.g. Skype, Facetime, Google Duo, Microsoft Teams) | • Video interviews  
  • Video small group meetings  
  • Virtual site visits | • Fairly common technology  
  • No cost to participants  
  • Works on computer or phone  
  • Adds visual component  
  • Can be recorded (Skype or FaceTime) | • Some audiences haven’t used video calls  
  • Connectivity in remote areas  
  • FaceTime is limited to Apple products  
  • May require participants to download and install an app to use via phone.  
  • Need to secure permission if recording |
| --- | --- | --- | --- |
| **Video Conference** (e.g. GoToMeeting, Zoom, Google Hangouts) | • Presentation with Q&A  
  • Focus Group  
  • Small group discussion  
  • Public meetings | • Best for facilitated presentations  
  • Can share video and presentations  
  • Chat function for questions  
  • Polling function to get immediate feedback  
  • Can divide up into breakout room for small group discussion (Zoom) | • May require participants to download and install an app to use on phone or laptop  
  • Can be hard to see all participants for large groups  
  • Need to secure permission if recording |
| **Podcasts** | • Interviews  
  • Sharing info | • Best for disseminating information to a broad audience | • Can require some tech production  
  • Audience must access via technology |
| **Social Media Channels** (e.g. Instagram, Facebook, Twitter, YouTube), NextDoor | • Virtual events  
  • Virtual groups (e.g. Facebook Group) | • Potential to reach even broader audience  
  • Use existing social media channels  
  • Easy for audience to respond or be engaged | • Can require some tech production (e.g. videos)  
  • Requires audience to have access to the same social media channels to access info |
VIRTUAL ENGAGEMENT EXAMPLES

INFORM

- **Virtual Tours**: Preservation organizations like the Historic Harrisburg Association have been putting out one virtual tour a week on YouTube. Others, like the Historic Preservation Commission for the City of Meridian, Idaho, are videoing local historic properties and then posting them to Facebook Meridian History and Instagram Meridian History pages. Stay-at-home offered opportunities for the Washington Historic Trust to publicize existing virtual tours of their historic sites. The Historic Hawaii Foundation has a variety of tours that can be downloaded from their website. The Nevada Preservation Foundation created walking tours of Las Vegas and Elko using Google Tour Creator. Recognizing that historic sites are places we look to for courage, comfort and inspiration in challenging times, the National Trust added virtual tours of places such as Madam CJ Walker’s home, Villa Lewaro to its website.
- **Virtual Preservation Month**: The National Trust’s Preservation Month in May 2020 went virtual with opportunities to unlock a new experience every day from May 1 to 31.

INTERACT

- **Virtual Conferences**: Plans to offer a statewide preservation conference in Arizona in June, 2020 shifted to a one-day virtual event scheduled for June 2020. In addition to plenary, keynote and breakout sessions, the conference will feature end-of-day virtual “Happy Hours” hosted by local preservation luminaries. In addition, this year the National Trust’s annual conference will be entirely virtual for the first time ever.
- **Virtual Events**: While the Nevada Preservation Foundation rescheduled their History at Home event from April to September 2020, they hosted a weekend of virtual events over the course of the event’s original weekend including online tours of historic places. Talks by well-known architectural historians and a move viewing party. The Netflix Party to watch Ferris Bueller’s Day Off was hosted by NPF’s executive director who did a running commentary on the architecture in the movie using the chat box. The event also featured Bueller Bingo and prizes. The online offerings will be available until at least September for those who missed them in April.

ENGAGE

- **Virtual Town Halls**: Preservation Maryland hosted a telephone town hall for members around the dinner hour using the Vekeo platform through Politicalrobocalls.com.
- **Virtual Public Meetings**: City preservation planners are using tools like Zoom and WebEx to livestream public meetings. Some are encouraging the public to submit comments via email which are read to commissioners. Others are testing the closed-captioning feature of Zoom to stay in compliance with ADA, or offer a safe “live” location with social distancing so people without access to the internet can participate.
USEFUL LINKS

- Smith Group: Equitable Community Engagement During a Global Pandemic and Beyond
- Bang the Table provides a free 30-minute webinar on Online Community Engagement Overview: The Basics (101)
- This Community Planning Toolkit: Community Engagement includes a variety of virtual and in-person community engagement tools and tips.
- This Preservation Leadership Forum blog post, Carrying On: Local Preservation through Virtual Meetings has some great ideas and guidance for local commissions and points to some resources from other organizations.