

Steph McDougal is the founder and principal consultant for McDoux Preservation, a historic preservation consulting firm that specializes in community engagement and planning. A former consumer-products brand manager with a decade of corporate marketing experience, Steph's previous articles for The Alliance Review addressed the use of administrative review for Certificates of Appropriateness and the cost of design guidelines.

Using Community Surveys for Preservation Planning

By Steph McDougal

When it comes to preservation planning, we all know that community input is essential for a successful outcome. Members of the public need to know that they have a voice in the development of these plans, and that their ideas and opinions are being heard and taken into consideration. By communicating early and often, being transparent in the planning process, and taking responsibility for addressing citizen concerns — even when those do not directly relate to the preservation plan — we can build and maintain the community's trust in our process, the plan itself, and ultimately our local government.

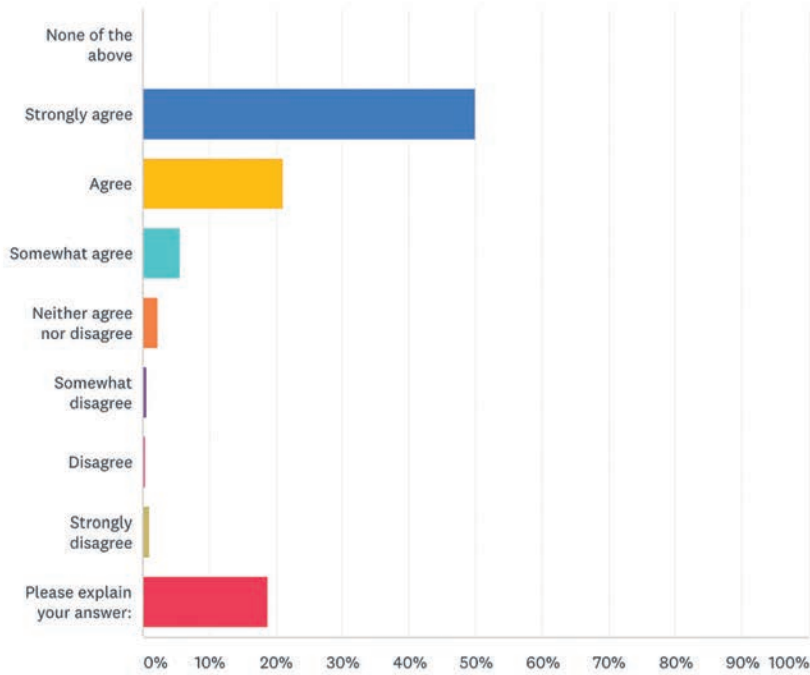
Before the COVID-19 pandemic, many of us relied on in-person meetings; we now know that virtual meetings can be even better-attended. In fact, one of our recent community meetings, held as a presentation during the regularly scheduled historic commission meeting, was broadcast on the city's WebEx platform, streamed live on Facebook, and recorded for posting the next day on YouTube, with nearly 1,500 views in the first 24 hours. The use of multiple online platforms is also a proven way to promote community surveys and improve citizen participation and response rates. Online tools can deliver surveys in a responsive format that works on any device, for easy completion by a multi-generational audience, and these survey tools also make it easy

for administrators to capture and export data for analysis.

Whether you currently think about public engagement as *market research* or not, community surveys are indeed just that, intended to tell us what our "market" wants, what they think, and what they value. The more information you have, the better, as long as it's reliable. We use both qualitative and quantitative research to identify issues of importance and then test the extent to which those issues reflect the opinions of the community as a whole. Qualitative data is captured first, through interviews, focus groups, or questionnaires completed by targeted stakeholders. Because qualitative data comes from a small number of people

I care about preserving our community's history, including historic buildings.

Answered: 613 Skipped: 135



| ANSWER CHOICES | RESPONSES |
|-----------------------------|----------------------|
| None of the above | 0.00% 0 |
| Strongly agree | 49.92% 306 |
| Agree | 21.21% 130 |
| Somewhat agree | 5.71% 35 |
| Neither agree nor disagree | 2.28% 14 |
| Somewhat disagree | 0.65% 4 |
| Disagree | 0.33% 2 |
| Strongly disagree | 0.98% 6 |
| Please explain your answer: | Responses 18.92% 116 |
| TOTAL | 613 |

Image courtesy of the author.

Typical online survey response bar graph

(and so is also sometimes described as anecdotal), we cannot assume that it represents the whole community. An opinion survey is then developed to further explore those topics with a wider audience and provide us with data that we can “take to the bank.”

At McDoux Preservation, we do quite a bit of audi-

ence research; here are the top five things we’ve learned that may be helpful to you.

Begin with the end in mind.

You should have a good idea of what you want to learn before you sit down to write and organize survey questions. By the time you have spoken to a few dozen stakeholders, you’ll probably have

some direction in terms of what you want to ask the larger community. Your entire survey effort should have a very specific goal, as well. If you are unable to articulate what you want to learn, why you want to know, and how you will use that information, you probably are not ready to write survey questions. We find it helps to make a list of what you want to find out before you start writing questions, and circle back to the list frequently – or at least check your questions against it once you have drafted them. Think about the data that you will want to report to your commission, city council, stakeholders, and community members. For example, if you are considering creating a new program that will require some upfront city investment, you may need to know whether the community is interested in the concept generally, willing to participate, willing to pay for some part of the program, etc. Try to put yourself in the community member's place and think about them as a customer. What do you need to know in order to promote historic preservation to them?

Plan for IDEA (Inclusion, Diversity, Equity, and Accessibility).

We always want to hear from as many community members as possible, and that requires the survey to be accessible to everyone. Learn about the demographic makeup of your community during the survey planning process and build IDEA (Inclusion, Diversity, Equity, and Accessibility) into your survey plan. Some considerations include the proportion of residents who speak English vs. other languages, literacy rates in your community, access to computers and internet/WiFi, and visual impairment. You can find information about the prevalence of these conditions in your city through U.S. census data, your local literacy council, and other studies specific to your area. We regularly work with local

library systems to help people take the survey on paper or online, for example, and make sure that answering survey questions over the telephone is also an option. Translating survey questions into languages other than English typically requires the assistance of the city's public information office, so we recommend engaging with them as early as possible to ensure that they have sufficient time for this task.

Plan ahead for publicity and promotion.

In addition to making the survey available in a variety of formats, and potentially multiple languages, you also need to publicize it to reach as many people as possible. We have placed flyers or posters at the library, in coffee shops, etc.; used door hangers and postcards to individual addresses to notify residents that the survey was coming and later, to remind them to take it; placed brief information on city billboards, community-center digital signs, and other city-controlled signage; and worked with the media to promote the survey to multiple audiences, including developing Spanish-language radio spots and providing interviews to Spanish-language television networks. Even if most of your survey responses are online and in English, making this effort communicates to the public that you really do want to hear from everyone and makes it more likely that they will take you up on the invitation.

Know how many responses you need.

A "response" is a completed survey, and you need enough of them to be sure (and assure city officials) that your results are, in fact, representative of the larger community. In a recent survey for a city preservation plan, we received more than 750 responses from the community (a city of about 325,000). Our goal had been 383 responses,

Which of the images below contain historic buildings, sites, or places? Select all that apply.

A. Lynnhaven House (photo credit: CPG)



B. Seatack Elementary School (photo credit: VDHR Archives)



C. Cutty Sark Hotel (photo credit: VDHR Archives)



D. Home in Cavalier Shores (photo credit: VDHR Archives)



E. Native American Archeological Site (photo credit: VDHR Archives)



F. Beach cottage (photo credit: CPG)



Courtesy vb.gov.com.

Visual online survey for Virginia Beach's Historic Preservation Plan.

enough for our results to achieve a 95% confidence level with a 5% margin of error. According to SurveyMonkey.com, "The number of respondents you need depends on your survey goals and how confident you want to be in your results. The more confident you want to be, the less of a margin of error you should accept." Fortunately, we do not have to be statisticians; online tools like SurveyMonkey make it easy to calculate the number of responses that we want. Online surveys also make it easy to track the number of responses received as you go, which can help you decide if you need to promote or publicize the survey more often or in different ways. For example, on our aforementioned recent survey, a boosted Facebook post (cost: \$100) mid-way through the survey's "open" window increased responses dramatically by putting our social media posts about the survey in the newsfeeds of more community members.

Remember that open-ended questions and comments take more time to analyze.

In that same survey, which contained 29 questions, respondents provided more than 12,000 comments, sharing additional information about the specific questions we had asked as well as responses to the final question, "What else do you want us to know?" That's a valuable addition to the rest of the survey results, but it took our team of six more than a week to process all of those comments into a usable format, whereas the answers to

Questions 1–28 only took a day to analyze, chart, and add to a summary report of results. Should you give respondents the ability to provide comments? Absolutely! Just realize that any open-ended questions are likely to be more time-consuming, when it comes time for analysis, and plan accordingly. It's best to make as many questions as possible "closed" with a clear answer set, although including an opportunity for additional comments is always a good idea for a planning effort. You learn so much from the things that people choose to tell you (much of which you probably didn't think to ask)!

We encourage everyone to take advantage of online tools (such as SurveyMonkey, but certainly not limited to that platform) as one of your information-gathering activities during the development of a preservation plan. Surveys can target entire communities, individual neighborhoods, and specific stakeholder groups. The only caution we would give you is this: embark on the survey with an open mind and a willingness to go where the data takes you. If you really love the idea for a new program but the community tells you that they are not interested in it, listen to them. We can all provide better service to the community by asking for their ideas, opinions, suggestions, comments, concerns, complaints, and feedback, and then paying attention to what they tell us, as often as possible. ■