

SURVEYS AND STRATEGIES

Reconsidering how and why we use survey data

Questions for Attendees

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- How many have prepared surveys?
- What is your method of survey?
- What web-based survey engines do you use?
- What are some reasons that you survey?

Session Speakers

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- **Lori Martin, Fundraising Specialist**
UT Austin, Historic Preservation graduate student

Surveys for Austin Theater Alliance
--data used to determine fundraising/membership strategies

- **Amy Hammons, CHC Outreach Coordinator**
Texas Historical Commission (THC) staff

Surveys for County Historical Commissions (CHC)
--data used to determine programmatic strategies

Focus of Survey Examples

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- Connecting audiences to organizational missions
- Emphasizing commonalities to increase connection
- Enabling survey audience to have a voice AND ensuring audience that their voice matters



Topics for Today

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- Survey Considerations (prior to administration)
- Survey Examples (random selection)
- Survey Dos and Don'ts
- Survey Follow-up and Next Steps



Survey Considerations

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- Analyze existing audience data on hand
 - ▣ What do you know/not know about these people
- Target the audience for your survey
 - ▣ Who should/should not be included
- Determine purpose of new survey
 - ▣ Develop statistical information about a subject
 - ▣ Take action based on survey results

Survey 1 Purpose

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- Austin Theatre Alliance wanted to learn more about its patrons' use of the theatre for programming and organizational planning
 - ▣ Goal: determine why people donate & attend programs
 - ▣ Goal: expand or narrow programming options
 - ▣ Goal: refine marketing strategies
- Survey Type—combination of question types, including multiple choice, ranking and open comments
 - ▣ Survey helps us connect with our audience, hear what they say and narrow or broaden our focus, depending on results

Survey 1 Example

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Info gathered by Austin Theatre Alliance from patrons

- Best means of communication
- Familiarity with organization
- Program/event preferences
- Overview of donor benefits
- Reasons why people donate to the organization



Survey 1—Communication Methods

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Please tell us how you currently receive information from us. Please check all that apply.

- Website
- Radio
- Mail
- Social media
- E-communications
- Newspaper/print ads
- Online media outlets
- Other



How are your limited marketing resources invested?

Survey 1—Familiarity with Org

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Which of the following Paramount programs/offerings are you familiar with?

- Donor benefits
- Youth education
- Summer camps
- Volunteer opportunities
- None of the above
- Stateside Theatre
- Film Programming
- Film Fan Membership
- Moontower Comedy Festival

What is your organization known for?

Survey 1—Program Preferences

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Indicate the types of entertainment genres in which you are most interested.

- ▣ Spoken-word
- ▣ Comedy
- ▣ Music—multiple genres
- ▣ Music—acoustic
- ▣ Film
- ▣ Dance
- ▣ Theatre
- ▣ Other

Do people want what you offer?



Survey 1—Donor Benefits

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- Paramount provides benefits to donors/subscribing patrons. Rank your top three preferred benefits 1 to 3—1 being the benefit you prefer most.
 - Meet/greet with artists
 - Access VIP-only areas
 - Access post-show parties
 - Comp concessions/drink
 - Recognition in programs
 - Preferred parking
 - VIP preferred seating
 - Waive ticket service fees

What motivates your donors and patrons?

Survey 1—Donor Priorities

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What is the most compelling reason to donate to the Paramount?

- ▣ To help preserve the historic venue
- ▣ To help underwrite performances
- ▣ To support youth education and outreach
- ▣ To gain access to better seating
- ▣ To receive additional donor benefits and recognition

Help others connect to organization's mission.

Supplemental Information

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- THC = Texas Historical Commission
 - ▣ State agency for historic preservation
 - ▣ THC staff serve as advisors to CHCs

- CHC = County Historical Commission
 - ▣ Individuals appointed by county commissioners courts
 - ▣ Unpaid volunteers
 - ▣ CHCs serve as local contacts for the THC

- THC and CHCs are partners

Survey 2 Example

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Info gathered by THC from CHCs

- Communication
- Familiarity with organization
- Programming preferences
- Partner benefits/responsibilities
- Reasons why people support/participate



Survey 2 Example

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Info gathered by THC from CHCs

- **Communication**
- **Familiarity with organization (i.e., THC)**
- **Programming preferences**
- Partner benefits/responsibilities
- Reasons why people support/participate

Survey 2 Purpose

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- CHC Orientations—Connect CHCs to THC mission
 - ▣ Goal: convey what is expected of a CHC appointee
 - ▣ Goal: convey the ways in which CHCs can work with the Texas Historical Commission

- **Survey/Evaluation**
Determine degree to which goals were met



Survey 2—Communication

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Indicate the degree to which you agree with this statement about our orientation training.

Orientation Evaluation	Strongly agree	Agree	At times	Disagree	Strongly disagree
The orientation material helped me have a better understanding of what is expected of a CHC.	60	21	1	1	0

Survey 2—Familiarity with Org

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Indicate the degree to which you agree with this statement about our orientation training.

Orientation Evaluation	Strongly agree	Agree	At times	Disagree	Strongly disagree
The orientation material helped me have a better understanding of ways in which CHCs can work with the Texas Historical Commission.	57	23	2	1	0

Survey 2—Program Preferences

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Provide comments about the orientation content provided—positive and/or negative. Include your name and email address/phone number, if you would like our staff members to respond to your comments.

Allow audience to voice opinions, preferences, etc. by including open-ended questions/comment boxes.

Survey 3 Example

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Info gathered for THC from CHCs

- Communication**
- Familiarity with organization
- Programming preferences
- Partner benefits/responsibilities**
- Reasons why people support/participate**

Survey 3 Purpose

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- CHC Outreach Program—Build CHC capacity
 - Increase CHC knowledge of preservation topics/tools

- **Survey/CHC report**
Determine CHCs familiarity with these topics/tools.



Survey 3—Communication

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How familiar is your CHC with the following topics?

Preservation Topics	Not	Minimally	Somewhat	Very
Federal regulatory reviews	73	41	38	25
Standards for historic properties	55	44	53	15

Survey 3—Responsibilities/Whys

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- Want to determine how CHCs using the educational material THC provides via listserv and website.

- Outline a more specific standard of measure
 - Haven't used information THC provided
 - Only CHC chair accessed this information
 - Chair shared information with CHC
 - Chair used information to educate CHC

Survey 3—Responsibilities/Whys

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To what degree have you used CHC listserv & THC web material to educate CHC on following topics?

Preservation Topics	Haven't used info provided by THC	Only CHC chair accessed this info	Shared info with CHC appointees	Used info to educate CHC
Federal regulatory reviews	103	16	32	19
Standards for Historic Properties	99	16	31	18

Survey 3—Responsibilities/Whys

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- Want to know why CHCs aren't using listserv & web material, which are primary services THC provides.
- Outline a more specific standard of measure
 - ▣ Didn't notice service was offered
 - ▣ Noticed but didn't take advantage of service
 - ▣ Noticed but service didn't help people
 - ▣ Noticed and service helped a little
 - ▣ Noticed and service helped a lot

Survey 3—Responsibilities/Whys

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Rank degree to which select THC services have helped your CHC expand its programming.

THC Services	Didn't notice service was offered	Noticed but didn't take advantage of service	Did not help us	Helped a little	Helped a lot
CHC listserv	29	27	4	61	47
THC website	12	13	2	39	97
CHC-specific web pages	14	16	1	42	94

Survey Examples Summary

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Surveys can do more than collect information

- Clarify communication needs
- Familiarize people with your organization
- Promote programming and events
- Explain relationship benefits and responsibilities
- Determine why people donate/support/participate

Survey Dos and Don'ts

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Do This—start survey with basic information

- Identify survey host/administrator
- Tell why survey is offered
- Explain why benefits him/her to complete survey
- Thank survey takers



Survey Dos

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Thanks for taking the time to give us your valuable opinion through this survey. *Your input will help us design a better experience for you* at the Paramount and Stateside. These theatres are truly treasures and your input will allow us to not only provide you with an *exceptional experience when you visit* but also—as we near our 100 Anniversary in 2015—will allow us to *ensure these treasures are here for future generations* to enjoy. We value your opinion and we value you as *a patron, friend and supporter of the Paramount!*

Survey Dos and Don'ts

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Don't Do This—make things more difficult

- ❑ Don't make the survey too long
- ❑ Don't ask leading or confusing questions
- ❑ Don't ask questions that have ambiguous standards
- ❑ Don't over-commit to survey respondents



Survey Don'ts

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□ Don't ask leading questions

- Would you consider donating to our annual fundraiser to help sick children?
- Do you favor a major overhaul of the current Federal Tax Code—currently thousands of pages long—that would replace today's burdensome tax system with one that is simpler and fairer?

Yes

No

No opinion

Survey Don'ts

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- **Don't ask confusing or convoluted questions**
 - Can you tell me, in your opinion, from the twenty reasons listed below, what is the most important reason people support the Organization?
Check all boxes that apply.

Survey Don'ts

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- **Don't ask questions that have ambiguous standards**
 - ▣ Did this event live up to your expectations?
 - ▣ Avoid limited ranges: Agree, Disagree, No Opinion

**Strongly
Agree**

Agree

**At
Times**

Disagree

**Strongly
Disagree**

**No
Opinion**

Survey Don'ts

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- **Don't over-commit to survey respondents**
 - ▣ Only ask questions for which you'll use answers
 - ▣ Don't give impression that all things are possible
 - ▣ Don't say you'll respond to inquiries if you don't have the capacity to do so

Survey Dos and Don'ts

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Do This—to ensure that survey is successful

- Test survey with individuals outside your organization
- Consider incentives for completing survey
- Send reminders to complete survey (set deadline)
- Keep in mind that typical response rates = 35%



Survey Follow-up & Next Steps

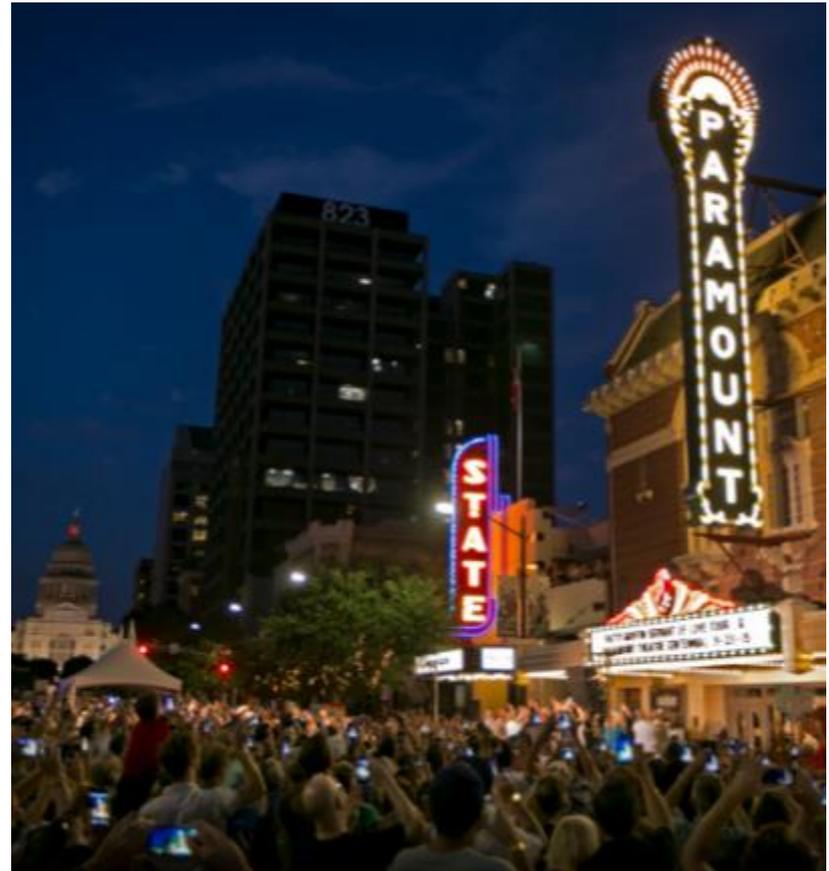
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- Consider results and statistics generated
- Flag results that don't make sense
- Identify additional questions/info needed
- Share results internally and externally, when appropriate
- Take action—make constructive changes

Questions from Attendees

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- What topics or ideas can we clarify and/or expand upon?
- What lessons have you learned from working with surveys?



Thank you for attending!

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