

Best Practices Guide to

# Surveys and Outreach





# About SBS

The **NYC Department of Small Business Services (SBS)** helps unlock economic potential and create economic security for all New Yorkers by connecting New Yorkers to good jobs, creating stronger businesses, and building thriving neighborhoods across the five boroughs.

SBS works with community-based organizations to build vibrant neighborhoods where New Yorkers can shop, work, and live by:

- Overseeing the largest network of Business Improvement Districts (BIDs) in the country, which delivers more than \$160 million in additional services throughout the five boroughs
- Offering training, tools, and one-on-one assistance to local community-based organizations
- Administering grant programs to strengthen and revitalize community districts
- Working with community partners to identify local commercial district needs and plan targeted solutions to revitalize and preserve diverse neighborhoods

This guide is a resource for local stakeholders – whether they are involved in BID formation, merchant organizing, or generally assessing their commercial corridor – to better understand surveying and outreach: what goes into a survey, how to undertake the associated outreach, and ways to make the survey and outreach process responsive to the district.



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# About This Guide

A needs assessment survey can tell a lot about a district, commercial corridor, or any other geographical area: what businesses might be needed in a commercial corridor, what services and resources residents and other constituents want to see in their districts, what issues need to be addressed. However, actually undertaking the survey process can sometimes feel daunting. There is no one correct method for how to begin surveying, especially when it comes to posing survey questions to a diverse mix of constituents that can be found within a commercial district.

In this guide, the **NYC Department of Small Business Services (SBS)** has compiled best practices for conducting surveys within a commercial district. By no means an exhaustive or prescriptive list of what to do, the hope is these tips and strategies will help the way you, your group or organization undertakes the surveying of the district – providing you with new survey tools and outreach methods and helping you consider underutilized citywide and/or district-specific resources. This guide is not meant to tell you what to put into a survey, it only provides suggestions, based on best practices, that can help you approach different survey audience(s) and what might be the best course of action for engaging with them.

These tips and strategies were collected in the context of Business Improvement District (BID) formation, as well as a Commercial District Needs Assessment (CDNA), but this guide can become a toolkit for anyone to use when surveying or conducting other types of outreach. To illustrate these strategies in action, the guide includes case studies looking at how SBS-supported groups administered their survey work as part of their initiatives. These case studies highlight unique strategies used to engage with a broad mix of stakeholders and constituents, and capture the most accurate data to address and understand district priorities.

For more information on SBS-supported initiatives in neighborhoods, please visit [nyc.gov/neighborhoods](https://nyc.gov/neighborhoods), or contact us at [neighborhoods@sbs.nyc.gov](mailto:neighborhoods@sbs.nyc.gov).



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# Survey Content

## Action items:

1. Take inventory of the district's physical and visual qualities and characteristics to inform survey questions.
2. Make sure the survey includes open-ended questions for survey audience to provide their own insights, desires, and address unspecified needs.
3. Consult past surveys and SBS-provided examples to consider what types of questions to include in the survey, and how the final survey could be formatted.

This guide is meant to help you understand surveying, associated outreach, and what should go into a survey based on your knowledge of the district. Surveys should include specific questions that reflect your understanding of the community and what needs you recognize. SBS can provide some guidance to help you determine what you might want to include and how you might format it.

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## Take Inventory

Survey questions don't just come out of thin air but are generally the culmination of observation and insights regarding the health and needs of the district. Even though you might have a sense of these aspects and characteristics, you might not be able to pinpoint what you specifically want to convey from these areas. Making a list of the district's physical and visual qualities is a good starting point:

- How many cracks are there in the sidewalk?
- How much lighting is in the district?
- What types of storefronts & businesses exist in the district, and what are their conditions?
- How is traffic and parking?
- What types of people do you see out and about on the streets daily?

Think about which characteristics make sense for the district. SBS can provide you with an Excel spreadsheet that lists points to consider, which can help you develop pointed questions related to areas where stakeholders and constituents want to see more attention and improvement.

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## Keep It Open Ended

To solicit specific answers to district-specific questions, many of the survey questions will likely be multiple choice and/or a ranking system that will help you determine what priorities hold more value for stakeholders and constituents. While you may already have an idea of what the district is thinking about and how this information will be included, it is important to keep in mind that no matter how well you know the district, there will still be more to learn about it.

Targeted questions rarely capture these new insights and therefore it is important to include some open-ended questions. This approach allows the survey audience the opportunity to share what they want and identify specific needs in the district. This will help you gain new direction and focus on how to move your initiatives forward.

## Case Study: Smith Street Alliance

The latest BID needs assessment survey was not the Smith Street Alliance's (SSA) first; this current effort is an offshoot of the prior Court-Smith BID formation. Although SSA is a different initiative, the approach to getting the information out to their constituents was the same as before (survey, outreach, and call for votes). The needs assessment survey link was posted on SSA's Facebook and Instagram accounts, local Facebook group pages, and the local NYC Council Member's and community boards' social media. SSA also sent the survey to retailers and property owners via email.

While SSA found most of the information from this needs assessment aligned with what they already knew from the prior effort, they gained surprising insights from the open-ended questions that came out of this second survey. Through the open-ended responses, SSA was able to determine needs that were not addressed or captured by the survey's multiple-choice questions; in particular, SSA found that once a BID is formed, there will need to be a greater focus on advocacy than previously considered. This data informed their areas of concern and how to allocate the budget in proportion to the needs of the area.

## Learn By Examples

Putting together a new survey may seem like a daunting endeavor when you think about what questions you want to include, how you want it to be structured, and how it might look on paper vs. online, among other considerations. It can be especially intimidating if you've never put a survey together before. However, SBS is a major supporter in the survey process and has assisted groups and organizations in the past on their survey initiatives. As a result, SBS has examples of surveys others have used that can serve as a template, or give you an idea of what a final survey might look like and how specific questions can be formatted. SBS also has other resources that can help you think deeper about the neighborhood and what types of questions to include in the survey. Don't hesitate to reach out.

### Some SBS Resources Include:

- Sample BID Needs Assessment
- CDNA Surveys

**NOTE:** For sample BID and CDNA surveys, be sure to email SBS Neighborhood Development at [neighborhoods@sbs.nyc.gov](mailto:neighborhoods@sbs.nyc.gov), or go to [nyc.gov/neighborhoods](http://nyc.gov/neighborhoods) to check out completed CDNAs, sample BID formation documents, and other SBS guides for more information.

## Case Study: Staten Island Chamber of Commerce

In 2016, the Staten Island Chamber of Commerce (SICC) undertook a Commercial District Needs Assessment (CDNA) survey in Downtown Staten Island. The survey was developed with guidance from SBS to help the chamber and survey participants think about their neighborhood, its assets, and its needs as part of the CDNA process. SBS provided Excel spreadsheets that directed SICC to make lists of what they observed: the cracks in the sidewalks, the conditions of the storefronts, and other aspects and attributes that contributed to the appearance and perception of health in the district. From these observations, SICC was able to garner better insight into the district's needs, which informed the types of questions they put into their survey.

### End of section questions:

- Did you determine survey questions through a mix of local knowledge and provided examples?
- Did you include a decent mix of predetermined and open-ended questions?

*Local NYC Council Member assisting with BID survey outreach in north Brooklyn.  
Photo Credit: Perch Advisors*



# Survey Audiences and Considerations

## Action items:

1. Create a survey strategy based around three Ts: Trust, Time, and Target Audience.
2. Learn to build trust and use it to ensure the survey is readily accepted by the stakeholders and constituents.
3. Create a realistic timeframe for rolling out the survey, collecting responses, and analyzing the data.
4. Develop a strong understanding of the district's demographics so surveying and outreach can be targeted to its specific needs.

Whether you're undertaking a needs assessment survey for BID formation, a CDNA, or surveying the district for your own initiatives, there is always a target audience that will need to be engaged in order to obtain the necessary data to move your project forward. SBS-related surveys are generally designed to gather information from specific stakeholders and constituents within commercial districts. Below is a list of specific stakeholder and constituent types that generally make up the audiences in SBS surveys, and how the agency defines each one:

- Property Owners: owners of the buildings (commercial, residential, and/or mixed-use) located in the study area
- Business Owners/Merchants: owners and/or operators of study area businesses
- Consumers: people who shop in the study area (may or may not be from the area)
- Residents: people who live in and/or around the study area

While most district surveys will seek input from all or most of the stakeholders and constituent types listed above, there are a few starting considerations listed below that will always need to be kept in mind as you determine a survey strategy.

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## Starting Considerations (The Three "T's")

A survey strategy relies on three Ts: Trust, Time, and Target Audience. These considerations will help you determine who you can reach, how you'll reach out, and the amount of time it might feasibly take to collect the minimum number of surveys. The sections below go into a deeper explanation of each consideration, which can help you determine the best approach to take for a survey strategy.

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## Trust: Build It, and Build Off of It

To even begin approaching district stakeholders and constituents (property owners, merchants, residents, etc.) with a survey, the most important aspect you can bring to the process is a sense of trust. If you undertake any kind of neighborhood survey, it is assumed that you are familiar with the district and/or are a well-known entity within it, either as an individual or through association with a local entity (nonprofit, elected official, etc.).

- Do the stakeholders and constituents know who you are?
- Do they know what you, your group, or affiliated entity has done in the past/aims to do for them presently?

- Do you have a friendly or cordial relationship with the stakeholders and constituents you wish to engage?

Your relationships within the district are what will make or break the effort if they are not strong, so be sure to work on building mutual trust in any way possible before you begin any survey outreach.

If you have limited time to undertake the survey and are unsure about your relationship with certain individuals/entities that are key to engage, think about any person or group who has trust with both you and them to facilitate any meetings and discussions. These individuals/groups will be able to serve as intermediaries and vouch for you. However, keep in mind that working off someone else's trust not only affects your trust with them, but also their trust with the target person or group. Any mistakes could not only affect your standing with the target entity, but also your standing with – and the standing of – the person/group who put you in touch with them, potentially affecting any future relationships and assistance from both.

Trust is not an inherent quality in all interactions but something that you build. The process of surveying is also a key opportunity to build this trust with district stakeholders and constituents. Soliciting survey responses – especially in person – gives you the chance to show stakeholders and constituents that you care about their opinion and are interested in what they have to say. Keep an open mind and approach new stakeholders and constituents with respect and dedication to the relationships you hope to cultivate from this survey and beyond.

*Business surveying in NoHo.  
Photo Credit: NoHo BID*



## Case Study: Staten Island Chamber of Commerce

The Staten Island Chamber of Commerce (SICC) knew the value of putting boots to the ground and reaching out directly to their constituents during their Commercial District Needs Assessment (CDNA) survey in Downtown Staten Island. Unlike other groups, SICC did not use any web tools and platforms (emails, social media, QR codes) to get their survey out, but instead took it to the streets: going to bus stops, businesses, and places people passed through on a day-to-day basis. They also made phone calls to their more active community members to ask them survey questions. These strategies helped SICC collect robust responses to their survey.

SICC's survey strategy would not have worked without their existing relationships with their community members. Thanks to the relationships they had cultivated throughout the Downtown Staten Island community, SICC found open doors and receptive constituents because of the trust they had built through their prior engagements. In addition to building off the relationships SICC currently had, the survey also became an opportunity for them to foster new relationships; SICC found that constituents want to share their thoughts on the district and appreciate when someone comes in with an open mind and a willingness to listen to them. The act of soliciting their feedback as part of a survey helped demonstrate that SICC has interest in these individuals and wanted to hear what they had to say.

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### **Time: Dedicate More of It Than You Think to Survey**

Surveys are a time commitment. It will take time to draft and format the survey and determine which format is best for the distribution of the survey. Understanding what goes into the survey and how it will be handled will be determined through your own knowledge of the district, and maybe with the assistance of SBS and/or a consultant. On top of that, the survey will still need approval from SBS before it can be released to constituents and stakeholders. With all these considerations, think about your timeline logistically:

- What is your absolute latest deadline for having the survey completed and analyzed?
- When will you need to have the draft survey finished?
- How long might it take for SBS to provide edits and approve the questions?
- What strategies will you undertake to make sure the survey reaches the broadest audience?
- How much time will the distribution and outreach take?

Answering these questions will help you do your due diligence to employ a multitude of strategies (discussed in the next section) instead of scrambling and relying on the more passive approaches (email, social media, QR codes on postcards/flyers) in hopes of hitting your target number before your deadline.

Depending on who you want/need to survey, you might have to dedicate days and hours beyond the usual Monday-Friday, 9 a.m. - 5 p.m. Think about what considerations you will need to take if you must extend surveying into the evening and weekend hours:

- Is this realistic for me or my staff/committee/volunteers?
- Will we need to tap into new networks of volunteers and/or community partners?
- Can we employ the same strategies, or will we need to promote through more targeted channels (events, community meetings, presentations at community boards, etc.)?

Once all the surveys have been collected, time is still needed to analyze all the feedback received. Think about what you will need to consider in order to complete the analysis:

- Are you employing a survey software, or will you have to compile the data manually?
- If using software, will you need to add the information from papers surveys into the software?
- Are you only exploring quantitative data, or will you have to employ qualitative analysis strategies?
- How will you illustrate your data (reports, infographics, etc.)?

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## **Target Audience: Understand Your Culture(s) and Demographics**

Not all districts are the same. Oftentimes the district can encompass multiple ethnic and cultural communities – sometimes even block by block!

- What are the norms and values of the communities within the district?
- How might this affect potential engagement with surveyors or the survey itself?

Consider any potential concerns related to the cultural/ethnic makeup of the district that can impact survey collection such as language access or time of year (holidays/observances). Think about strategies to mitigate any issues, whether that's recruiting surveyors from within these communities themselves, or partnering with any organizations – locally or citywide – that could potentially facilitate this outreach and communication. Knowing the different aspects of the communities in the district will also give you a sense of what questions you might need to include in the survey, which ones to avoid, and how to structure certain questions before talking with specific people.

Additionally, think about other demographic aspects of the district:

- How old are the stakeholders and constituents?
- What is the average income range within the district?
- How severe are any disparities that exist?

Keep these aspects in mind as you draft survey questions, target your outreach, and organize community events to make sure that these areas are not leaning towards one group of district stakeholders and constituents over another.

*Community outreach in the Meatpacking BID district.  
Photo Credit: Breakthrough Media for Meatpacking BID*



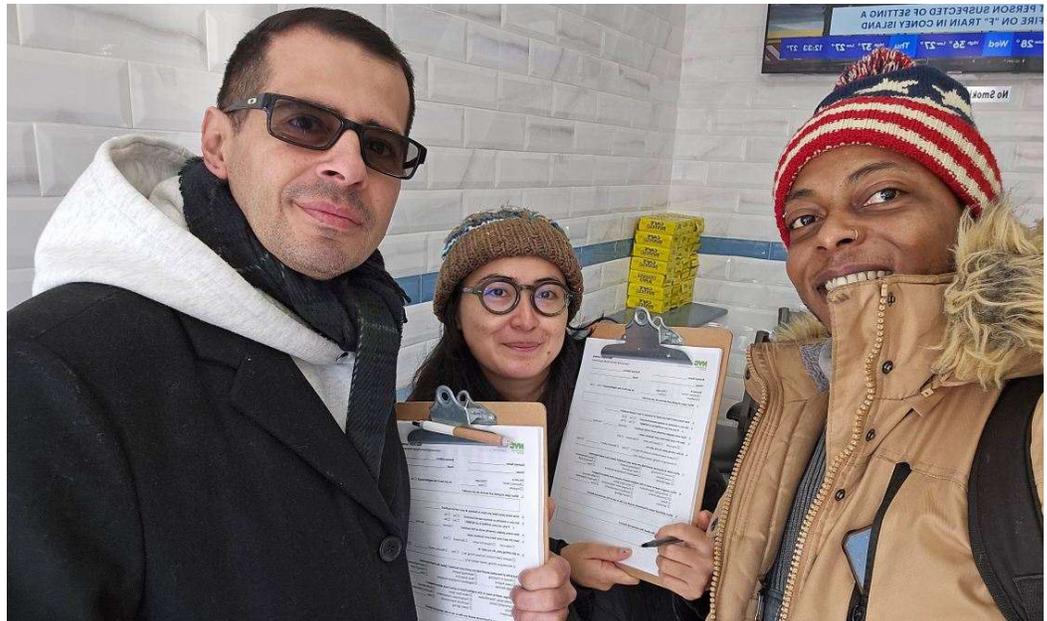
## Case Study: Community League of the Heights

Like most groups undertaking needs assessment surveys, the Community League of the Heights (CLOTH) posted the survey to social media (Instagram, Facebook, Neighborhood.com, and Washington Heights Patch), included the link in their newsletters, had an article written about their efforts on Patch, and distributed postcards with QR codes on them. Community partners, such as the Washington Heights BID, Community Board 12, and the Manhattan Chamber of Commerce, even reposted the survey online. However, these methods only yielded a few responses. In particular, CLOTH wanted to get feedback from their merchants who they knew [based on their other outreach experiences] were not the most receptive to emails or phone calls, but needed to be engaged one-on-one in person.

CLOTH received most of their surveys by going door-to-door to the different businesses, but this was not without its own challenges. Some of the merchants were not previously engaged with the organization so it was difficult to convince them to take the survey, and many merchants did not have time to talk because they were running their businesses. Language and cultural barriers have also been a significant factor as many of the district's merchants are of Arab, Asian, or Latin/Hispanic descent. While many of the business owners did speak English, it was not their first language. Though the main individual leading the survey effort speaks Spanish (and had the survey translated to Spanish), this person is not of Latin/Hispanic descent, so some businesses were apprehensive about corresponding with them. There were also difficulties engaging with business owners of Asian descent as the organization did not have any Asian language capabilities.

Since their district includes a large Yemeni population, CLOTH wanted to recruit an Arabic speaker to be more culturally relatable when engaging with Arabic speaking merchants, yet they found difficulty recruiting an Arabic speaker due to unique interpersonal dynamics. Though the group employed student community members to assist with the survey, some of whom spoke Arabic, none of them felt comfortable promoting the survey at the Arabic speaking businesses. This is because of the interpersonal concerns within the Arabic-speaking community in Washington Heights; many of the students were the children of some of these business owners, family friends, and/or involved in the community in some way. As a result, dynamics exist between these individuals and entities that CLOTH would not have known about. In order to engage with these businesses in the future, CLOTH is looking to partner with other Arabic-speaking groups and organizations – ideally from within or close to Washington Heights, but also looking citywide – so there will be less of a chance for an interpersonal issue to arise from the surveying.

*CDNA surveying with  
the Cypress Hills Local  
Development Corporation.  
Photo Credit: NYC  
Department of Small  
Business Services*



## Bonus “T”: Toughen Up

Even if you prepare a strategy based on all of these considerations, that doesn't necessarily mean the survey audience will want to take the survey, or even respond well to all the questions. You might experience reactions that range from apathy to antipathy, as some might feel certain survey questions are invasive, or not understand the point of why they are being surveyed.

When confronted with pushback, don't take it personally and don't lose heart. Just because a few individuals might have negative reactions to the survey doesn't mean the survey is bad. Have patience and keep moving forward, there will be plenty of individuals in the district who will want to take the survey, and it might even be worthwhile to revisit some of the more apprehensive stakeholders and constituents the more you get to know the community and develop comfort in talking about your initiative.

### Tip:

Above all, keep in mind that the community knows its major stakeholders and constituents. The best way to get these surveys out is through members of the community who can speak best to how these efforts, goals, and intended outcomes will benefit the area of focus.

### End of section questions:

- How high is the level of trust for you, your initiative or organization?
- Are you limited by any time constraints (funding, external commitments, etc.)?
- Do you have an understanding of the target audience(s) in the district?
- Are you able to make connections with individuals/organizations who can help provide inroads into these communities?

*Survey volunteers getting ready to get the BID needs assessment survey out in north Brooklyn. Photo Credit: Perch Advisors*



# Outreach Strategies and Tools

## Action items:

1. Think about an outreach strategy that leverages physical and digital surveying approaches.
2. Learn the strengths and weaknesses of the tools, softwares, and methods at your disposal.
3. Make your face known throughout the district, and build a better understanding of the stakeholders, constituents, and the area.

Sometimes it is necessary to ask: how exactly do I undertake a survey? A variety of tools, softwares, and methods exist to help facilitate survey outreach and distribution – some in a more active fashion, others more passively. Multiple strategies and tools should be used concurrently, and there shouldn't be any overreliance on one or another. Knowing the district will help you determine which strategies and tools make sense for your efforts, and below are some tips to help you figure out which ones to use. While most of the listed strategies can be applied across almost all audience types, we highlight which ones might be particularly useful to specific audience(s). The following strategies are also broken down by approach (physical/in-person or digital).

## Never Assume Any Surveying Tool or Method is “One Size, Fits All”

Regardless of the route(s) you decide to take, keep in mind both digital and physical surveys have their advantages and disadvantages. Don't assume one format is better than the other, or that any one method (emails, direct outreach, etc.) will yield more results than another. All surveying should be a combination of tools and methods to ensure stakeholders and constituents respond to the one that is the most convenient and easily understood for them.

*Applicable to all audiences*



## The Power of Merchant Organizing

Learn More



careers  
businesses  
neighborhoods

Leverage your collective power to increase your voice and improve your local neighborhood.

Merchants associations can give small business owners:



Stronger Voices



Greater Resources



Stronger Business Community



Improved Quality of Life

## Digital

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### **Be Intentional with Your Surveying Software**

Many surveying softwares exist on the market these days; a popular premium choice employed by many tends to be SurveyMonkey, but surveys can be created using Google Forms, or other software with specific analyzing functions. Many of these softwares make analyzing survey results easier as they can summarize, visualize, and even compare response data. Premium surveying softwares generally have a subscription fee, with varying features depending on the pay level (though some offer discounts to nonprofit organizations). Ask yourself:

- Who is my audience?
- What are we doing with this data?
- Will my intended audience respond to this survey format?
- Is the survey easy to understand in the chosen format?
- How do we want to present the data gathered from the survey?
- Are we looking to compare specific data points within the survey?

*Applicable to all audiences*

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### **A QR Code Will Not Guarantee Survey Responses**

QR codes are helpful: they are visual links that leverage the power of mobile devices. Putting a QR code on a poster, flyer, postcard, mailer, or any other type of outreach material can make it easier for potential respondents to access a survey and fill it out right then and there. However, creating a QR code and putting it on your materials doesn't mean people will necessarily scan it. A QR code is only one of many tools that can be used when surveying. Do not assume a visible QR code will guarantee that people will take the survey.

*Applicable to all audiences*

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### **Don't Forget the Importance of Analog**

While technology has come a long way and made it easy to send out reports via links, emails, and QR codes, don't assume these methods are a catchall or default because of their ease of use. Neighborhood stakeholders and constituents might not have access to some form of tech that would let them open and answer a web survey, whether that's due to age, economic status, or some other situation. Distributing paper copies and entering the information manually into the online survey software may be tedious and time consuming but will ultimately capture a larger and more diverse mix of community voices, painting a more representative picture of the district and its needs.

*Applicable to all audiences*

## Physical

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### Make Your Face Known

One of the best ways to directly obtain information from surveying is to meet with stakeholders and constituents face-to-face and walk them through the survey on-site. Some ways to facilitate in-person surveys include:

- Bring an electronic device (like a tablet or even a smartphone) and have the stakeholder or constituent fill out the survey either by themselves, or by asking the questions and inputting answers directly.
- Bring around paper surveys and have the stakeholder or constituent fill out the survey either by themselves, or by asking the questions and writing down answers yourself.

When going door-to-door and face-to-face with these surveys, here are some important points to consider:

- **Language Barrier:** What are the languages spoken in the district? Will language be an obstacle to having questions understood and answered? Think about which languages might need to be considered, and what resources exist to find the appropriate speakers and translators for your outreach (and feel free to reach out to SBS for help).
- **Time and Patience:** While going door-to-door and face-to-face is a great way to ensure you speak directly with key stakeholders and constituents in the district as part of your surveying efforts, keep in mind that even if you show up it doesn't mean the stakeholder or constituent is available to talk. Sometimes you might want to talk to the owner of a busy shop, or sometimes the business or property owner is in a meeting and unavailable until a specific time past the hours you set aside for direct outreach. In these instances, you might have to wait and speak with store owners or employees between clients, or come back to offices when meetings are done or when you are told the person in question will be available. Be patient and plan days and times to survey with a buffer for these types of situations. If possible, coordinate with the entities or those involved in their scheduling to ensure that you will talk with the person whom you want to engage.

*Most applicable to business owners/merchants, consumers, and residents*

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### Dress for Success

When it comes to surveying a district, it is important to remember that the way you present yourself has the capacity to either make or break down barriers between you and the survey audiences. One of the easiest variables you can control is how you dress. Think about how you might be perceived by the target audiences:

- Will community members and merchants respond well if you show up to the district in formal/professional clothing?
- How will a property owner react if you come to a scheduled meeting in casual attire?

Think about what will make the target audience most comfortable if you showed up to their space within (or even beyond) the district to ask questions pertaining to the area, specific inquiries, and survey goals.

*Applicable to all audiences*

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## Be Aware of and Understand Important District Spaces and Places

If you are familiar with the district, you are familiar with its locations: places that are most popular, see the most foot traffic, and are significant to various groups within the community. When using passive strategies, such as leaving hard copies of the surveys to be filled out, or postcards and flyers with a link or QR code, it's important to know which of these locations will encourage stakeholders and constituents to see, take, and fill out the surveys. This could be at a local library, community center, school (depending on the audience you want to engage), or even a well-known and highly trafficked business. Additionally, if you are going to set yourself up at a location in the district to facilitate passersby to take the survey directly, think about which areas in the district most of the target audience will pass by or gather.

However, keep in mind the amount of attention you pay to certain sections of the district. In some instances, the more well-known and well-travelled parts of the district can unknowingly cause bias towards only surveying – or even giving an inordinate amount of attention towards – that area. Be mindful of all the parts of the district, even the ones that don't garner as much attention, to make sure you capture an accurate representation of the district as a whole.

*Most applicable to business owners/merchants, consumers, and residents*

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## Digital & Physical

### Don't Be Afraid to Incentivize

Taking a survey, especially one that includes many questions and lines of inquiry, takes time. Sometimes it is necessary to provide stakeholders and constituents with a little incentive to devote their time to the survey. This could look like being presented with a small item for completing it in person, or letting respondents know that if they fill out a survey they could enter a raffle for a big-ticket item. What this incentive looks like should be determined by you, your organization, or group, but a big-ticket item donated by a local stakeholder is both a way to empower their participation and get a known and trusted entity associated with effort.

*Most applicable to consumers and residents*

*Meatpacking BID providing treats as part of their organizational outreach.  
Photo Credit: Breakthrough Media for Meatpacking BID*



## Case Study: Rockaway East Merchants Association

As part of their BID formation effort, the Rockaway East Merchants Association (REMA) conducted a needs assessment survey in Downtown Far Rockaway (DFR) from summer 2021 until February 2022, with the assistance of a private consultant. Although REMA undertook their surveying during the height of the COVID-19 pandemic, they were able to gather more than 500 survey responses, the majority of which were collected through in-person survey strategies. To secure responses, REMA employed a variety of creative strategies; knowing their proximity to major public transportation points, surveys were distributed at local subway stops and bus stations as many community members gather at and pass by these points. To further incentivize people to take the survey, REMA distributed personal protective equipment (PPE) to survey respondents, as well as offered them the chance to put their name in a raffle for a 52-inch TV. These items were donated by local community groups and the Queens Chamber of Commerce.

Additionally, REMA found support from their local businesses; they were able to provide the survey to some of the business owners, who in turn distributed it to their long-term clientele base with whom they had developed a relationship and sense of trust through the years. The businesses further incentivized some of their customers who they knew had the greatest need by providing them with a free Thanksgiving turkey if they filled out the survey.

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### Remember to Get Your Messaging Across

While getting the needs assessment survey out to the largest and most diverse audience, it is important to remember to center your messaging about the survey and its importance to the initiative you are undertaking. This messaging needs to remain consistent and accurate across platforms, and it not only applies to your effort, but community partners as well. Make it clear to anyone promoting this survey that you are using specific language in your outreach emails and social media. Creating a guide or toolkit for social media posts and emails can be useful to ensure consistency in your messaging, and the messaging in promotional and outreach materials from partner entities and organizations.

Ensuring everyone is on the same page and has access to the same messaging will mitigate any potential discrepancies that might occur as others who are not directly leading the survey effort engage with the public, stakeholders, or constituents. If the target audience is confused due to conflicting or inconsistent information, it can potentially make them wary of the survey, let alone supporting the entire related initiative.

Additionally, if you are having volunteers and neighborhood partners facilitate the survey in person, make sure they understand what the survey says, how you came to this information, and why you are asking for it. Everyone involved in this effort – both the staff and committees leading it, as well as the volunteers and partners who are involved at specific points in the process – need to be on the same page to mitigate any potential confusion and discrepancies.

*Applicable to all audiences*

CDNA surveying with the HUB Third Avenue BID. Photo Credit: NYC Department of Small Business Services



### Case Study: Gowanus Canal Conservancy

From March through July 2022, the Gowanus Canal Conservancy (GCC) circulated a needs assessment survey throughout the study area they identified for a possible BID formation. GCC used typical outreach channels for distributing the survey: in-person events, email and social media posts, door-to-door canvassing, and direct mailing. In order to gather surveys in the quickest manner, GCC promoted the survey link in their general mailings and outreach materials, and had computers and electronic devices available to take the survey at in-person events. Although GCC was able to gather many surveys and hit their numbers through these electronic channels, the organization now thinks that having paper surveys available would have helped garner even more responses, and from a wider audience within the district.

Additionally, GCC developed their own social media and email guide that they sent to partner groups and organizations they asked to promote the survey. The guide provided sample language, formatting, and visual element suggestions (photo, video, other image) to be used across a variety of social media platforms and within targeted emails. GCC found that partner groups and organizations relied on this guide when crafting posts and emails related to the needs assessment survey. The guide also provided sample hashtags and listed other partner organizations to potentially tag in social media posts.

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## Keep Your Message Simple and Succinct

Often, a survey will include a description as to why it is being undertaken – whether it's a write up at the start of the survey or an explanatory card or one-pager included alongside the survey. This can be particularly helpful if you don't have the time or capacity to explain your initiative on a one-on-one basis during direct outreach. While it is important to be clear about your initiative, any kind of descriptive blurb or flyer can wind up being too long and involved, which runs the risk of the target audience ignoring the message due to information overload. Try to keep your message concise in these instances: only include the most important information, don't get bogged down in too many details, and try not to overexplain the points you are adding, as well as avoid making them too vague.

Whether or not you are crafting a separate explanatory text or sheet, think about the format and design that would make sense. Does it need to be a full write-up, or can the same thing be accomplished with a bulleted list? Is your choice of language easy to understand and does it draw the reader in? For a separate flyer or postcard, is it a visually engaging design that supports readability? All these elements will work together and help get your message across more easily.

*Applicable to all audiences*

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## Have a Sense of What's Working and What Needs Adjustment

Be sure to keep an eye on the number of responses you get over the course of the survey period to get a sense of what you might need to change or adjust:

- How many responses came in once a social media post/campaign was launched?
- How many responses came from a direct mailing (paper or email)?
- Did surveying in person yield many responses?
- How did a flyer or postcard affect the response rate?
- How many paper surveys were collected from partners and stakeholders each week?

This way, you will be able to assess which approach is best and yielding the most responses, and what other adjustments to the process may be needed. Each district is going to find they have different strategies that work for them, and checking response rates after the launch of each method will give you a sense of how to move the effort forward. Tracking the strategy or method of each response can help you monitor when and how many surveys have come from each source.

*Applicable to all audiences*

### End of section questions:

- Are you using a mix of surveying tools and technologies (online and offline)?
- Does the community recognize you and/or the initiative/organization you represent?
- Is your messaging inviting and understandable?

# Surveyor Capacity

## Action items:

1. Empower district stakeholders to take charge in distributing the survey to their connections and constituents.
2. Ensure those undertaking the actual surveying can speak about its purpose.
3. Follow up on your outreach, especially to stakeholders and constituents who you met face-to-face.
4. Take any and every opportunity where you can directly or indirectly promote the survey.

No matter how you undertake a survey, the distribution and analysis of it will always rely on a level of human intervention. Whether this is undertaken by you, staff members, community partners, an outside consultant, or volunteers, you will need to determine what capacities you can rely on from the people already involved and where you can obtain extra assistance. Listed below are some avenues to tap into for extra assistance, along with suggestions for how to use them.

## Rely on the Support of Your Stakeholders

The group pursuing this effort (whether it's a steering committee, motivated merchants, or some other assemblage of supporters from the area) is there to help you, and in theory should be comprised of major stakeholders from the community: property owners, business owners and commercial tenants, local nonprofits, residents, etc. As a result, it is safe to assume these entities have connections and insights within the district for disseminating the survey and gathering new data. Think about who or what entities in the district have major local connections and how they might be able to engage them and their stakeholders and constituents.

*Applicable to all audiences*

*District surveying can take many forms, not just a full survey with defined questions. It is important to think about the types of places where you will be presenting your survey, what information you are hoping to gather, and how involved you want the survey to be for the potential audience. Photo Credit: Castle Hill BID*



## Case Study: Alliance for Coney Island

In early 2023, the Alliance for Coney Island (ACI) undertook a needs assessment survey as part of their BID formation effort. ACI undertook the survey in an expedited period of about a month, drawing from their local knowledge and neighborhood connections to ensure the survey was distributed to the widest audience possible. In addition to using the typical channels of email and social media, ACI staff went door-to-door in the district asking business owners to fill out the survey, either via a printed copy, or by providing verbal answers that staff recorded in SurveyMonkey on a mobile device.

ACI was also able to rely on some of their major neighborhood stakeholders to get the survey directly into the hands of their target audiences. Here are two examples:

1. A local community center hosts a food pantry at their location in the western end of Coney Island. The center's director, who also serves on ACI's Board of Directors and co-chairs the Coney Island BID steering committee, made paper surveys available and encouraged pantry clientele to fill out the survey. Completed surveys were given to ACI at the end of the week.
2. A local restaurant with a long history as an anchor and year-round destination within the Coney Island Amusement District hires much of its staff from the local area. Knowing the makeup of the employees, the general manager (who also serves on ACI's Board of Directors) distributed paper surveys to his employees and returned the completed surveys to ACI.

Another challenge ACI faced was the large language disparity within the Coney Island area. As a neighborhood with a significant immigrant community, one can find businesses with Arabic, Chinese, Russian, Spanish, and Urdu speakers along parts of Coney Island's commercial corridor, often on the same block. Here are some examples of how ACI worked to address the targeted languages in their district:

- SBS was able to send an employee who spoke Russian to communicate with Russian-speaking businesses and constituents during outreach efforts
- NYC Council Member Ari Kagan's office sent an employee who spoke Chinese to accompany ACI staff when undertaking outreach to Chinese-speaking constituents
- The Arab American Family Support Center (AAFSC) partnered with ACI on several initiatives and were able to connect with Arabic and Urdu speaking constituents
- ACI interns who spoke some of the targeted languages (Spanish and Chinese) became invaluable during general outreach efforts to facilitate information on BID formation and other initiatives

**NOTE:** The list above is non-exhaustive and specific to the context and connections relevant to Coney Island. For your own initiatives, some of these entities might be relevant but always set out to understand which entities exist — locally or citywide — that could be of assistance when working with your specific demographics.

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## **Make Sure Your Surveyors Know What Information You Need**

When undertaking surveys, bear in mind not every respondent will answer every question, whether out of discomfort with providing certain information, feeling like certain questions are not relevant to them, or just not having an answer to give. However, depending on what you hope to understand from this survey, there will be specific questions you will want answered. For electronic surveys you can make those questions required in order to proceed and submit the survey, but for hard copies this is not the case. If you have staff members, volunteers, and/or neighborhood partners assisting with in-person surveying using hard copies, it is important to make sure they know which questions are the most relevant to your effort and to ensure respondents at least fill those out, if nothing else.

*Applicable to all audiences*

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## **Get Schooled**

Capacity can be a major challenge faced by individuals, organizations and groups when undertaking a survey, especially if funding for new staff members is limited or if much of the work is supported by volunteers. A potential solution is to partner with local schools; some high schools have requirements for community service, so assistance with the surveying could potentially fulfill that requirement. A local school would also have the added benefit of having students who live nearby and understand the area. If budget allows, you might even be able to provide the student(s) a small stipend or take on a highly motivated one as an intern. Additionally, some programs at local colleges (generally in the social sciences) might be interested in partnering as part of their course objectives, or might be able to offer course credit and/or internship compensation to interested students. Depending on the level of education and understanding, a college student (or graduate student if you can connect with a relevant program) could also assist with analyzing the survey results.

*Most applicable to business owners/merchants, consumers, and residents*

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## **Follow Up and Pound the Pavement**

Follow up is one of the most important parts of undertaking any type of survey.

- Were multiple emails with links sent out?
- How often was the survey link posted to social media?
- Did partner groups and organizations distribute the survey (in-person or online) to their stakeholders and constituents?
- If so, how much feedback did they receive and did they return their completed survey forms to you?
- Did any groups or organizations ask for more outreach materials?

Though you may feel your repeated outreach could be perceived as off-putting, ultimately making sure you collect as many surveys as possible within the time frame you have set out to collect them is for your benefit and the district at large. Tracking the number of times you reach out to each stakeholder and constituent can be a helpful way to determine a plan later on for connecting with unresponsive individuals and organizations.

*Applicable to all audiences*

## Don't Feel Ashamed to Be Shameless

Getting a survey out to the target audience may at times seem daunting, especially when follow up may make you feel like a thorn in the side of stakeholders and constituents. However, being a little shameless with your outreach is one of the fastest ways to get the survey out to the greatest number of people. Are you or your group/organization meeting with a particular group of stakeholders? Bring copies of the survey for them to take. Hosting or partnering on an event? Try and set up a space for attendees to take the survey. Take any and every opportunity where you can directly or indirectly promote the survey.

*Applicable to all audiences*

### End of section questions:

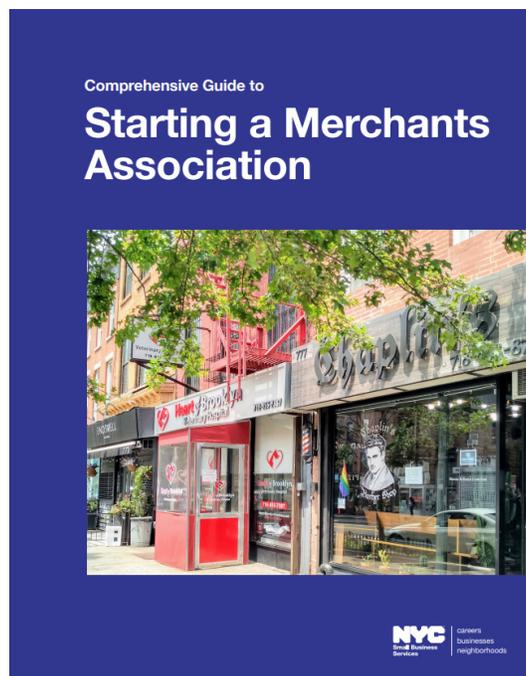
- Are you able to turn to stakeholders and constituents for support and assistance?
- Did you thoroughly prepare your surveyors with the most accurate information for undertaking survey outreach?
- Have you been following up on the surveying and outreach efforts?

Whether you are currently conducting a survey, doing outreach in your neighborhood, or thinking about how to start one as part of a new initiative, the hope is this guide will offer some strategies and insights into approaching the process. Do not think you need to do this solely on your own, the NYC Department of Small Business Services is here to help guide you through the process and provide assistance.

Please visit [nyc.gov/neighborhoods](https://nyc.gov/neighborhoods) or email [neighborhoods@sbs.nyc.gov](mailto:neighborhoods@sbs.nyc.gov) for resources and to contact SBS directly.

# Other SBS Guides

Surveying is one of the strategies many community groups, CBDOs, and BIDs use as part of their own work, as well as initiatives such as merchant organizing and BID exploration. In addition to this guide on surveying, SBS also offers other guides on starting a merchants association, and BID formation and expansion. If you, your organization, or group is interested in, or currently pursuing these activities, check out these other SBS guides:





The NYC Department of Small Business Services helps unlock economic potential and create economic security for all New Yorkers by connecting New Yorkers to good jobs, creating stronger businesses, and building thriving neighborhoods across the five boroughs.

[nyc.gov/neighborhoods](https://nyc.gov/neighborhoods)



careers  
businesses  
neighborhoods