

Methods Guide

WALTON FAMILY
FOUNDATION



Gehl

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Why We Measure

*Revealing impact
over time, with
a data-driven
approach*

The Walton Family Foundation Design Excellence Program is guided by four principles: strengthen public life, elevate standards of sustainability and resiliency, celebrate local culture and place, and build regional capacity. **An essential element of the Program is to identify how these principles come to life, to better understand who uses a space, and to identify what impact it has on the community over time.**

Evaluation can help uncover project impacts, such as how ambitions are raised among the local design community, that more children walk to school, or that people are socializing with their community in a place. Observing, listening, and collecting before and after data will reveal patterns and stories about the impact of your projects.

The sample survey methods included here help uncover these learnings. They are designed to:

- * **Reveal human experience**
- * **Collect data that helps make objective choices**
- * **Inform strategy and design**
- * **Ensure accountability**
- * **Benchmark progress**
- * **Steer future investment in Northwest Arkansas Design Excellence projects**



Putting the Methods to Work

Overview of Methods

Developing a fuller picture of public life on a site, before and after the construction process

The methods included in this document collect and generate quantitative and qualitative data that serve as benchmarks. They can illuminate cultural, historical, institutional, and economic assets to build on, and reveal potential challenges that impair urban quality and inhibit public life.

Within this document are four key categories of methods:

Gauge Perception

Intercept Survey
Focus Group
Civic Engagement
Social Media

Capture data on visitor **demographics, experience, and perception** of a space

Observe Activity

People Moving
People Staying

Observe **movement** through the space, and **activities** of people staying there

Map Conditions

12 Quality Criteria
Place Inventory (incl. Seating / Facade / Sidewalk / Shading / Lighting Studies)

Document specific **physical features** and perception of **how a space feels**

Gather Internal Data

Environmental Data
Operational Data
Financial Data

Explore additional methods, such as **civic engagement** and **social media**, as ways of collecting data

Understanding how site type informs evaluation methods

The sample methods we've included here can be used to collect baseline (before construction) and post-occupancy (after construction and project opening) data. For some metrics, it is difficult to collect baseline data. For those, the methods contribute to understanding existing conditions. Indeed, through our work with the Program thus far, we've found that the baseline approach and mix of methods used for evaluation often hinges on the level of public life at the site already.

For example, a greenfield site without any built features or programming would not be conducive to an intercept questionnaire during the baseline — because there probably wouldn't be anybody there to survey! In this case, an intercept questionnaire would only be helpful post-occupancy, to understand people's perception of the newly opened project.

On the other hand, if a Design Excellence site is an existing park slated for a redesign, then an intercept survey is suitable as both a baseline and a post-occupancy method. Asking the same question of respondents in each survey (e.g., Do you feel safe here?) allows for direct comparison of results from before and after the project was completed — in short, it helps us tell a story about the project's impact.

What's most important to remember is that each project is distinct. As such, the mix and content of methods will have to be refined on a project-by-project basis — and some projects may require the use of additional evaluation methods not included in this document.

Data Collection Checklist

Translating goals and metrics into a plan

Ready to get into the field? Consider these factors.

Once you've finalized your goals, metrics, and methods, you can begin planning for data collection — so you can gain an accurate picture of life on-site before detailed design or construction begins. You could reach this point at the beginning of your grant if you're certain of your goals, or once you've engaged key stakeholders and thought partners (e.g., designers, community).



TIME

Decide survey days. Identify days that represent 'typical' days at the space. If there is a lot of programming on the site already, pick a day with an event that might be considered 'typical.' It's also best not to survey when there is particularly inclement weather that severely detracts from use of the space (e.g., heat wave, rainstorm)

Decide survey hours. Select two to three peak times during which you can conduct intercept surveys and observations. This period can be based on when you feel there is peak activity at the site, such as lunch time, or morning and evening rush hours.

Be consistent, especially for counts. Weekday moving counts can be compared to weekdays', but not weekend days'. One day's evening count can't be compared to a morning count from another day — the life of a site changes with the passage of time! It's more important to create a survey schedule that works for your team and generates quality data, than it is to capture data that can't be compared.



PEOPLE

Consider if you need volunteers. Are there community leaders, college students, or other helpers who may want to get involved? What days can they participate? Can they also help with inputting data? Surveying can be done by anyone who will pay attention to detail and respect the survey takers' privacy and anonymity. A bonus of engaging volunteers is that it involves more people in your project — and maybe even generates more support for it.



LOCATION

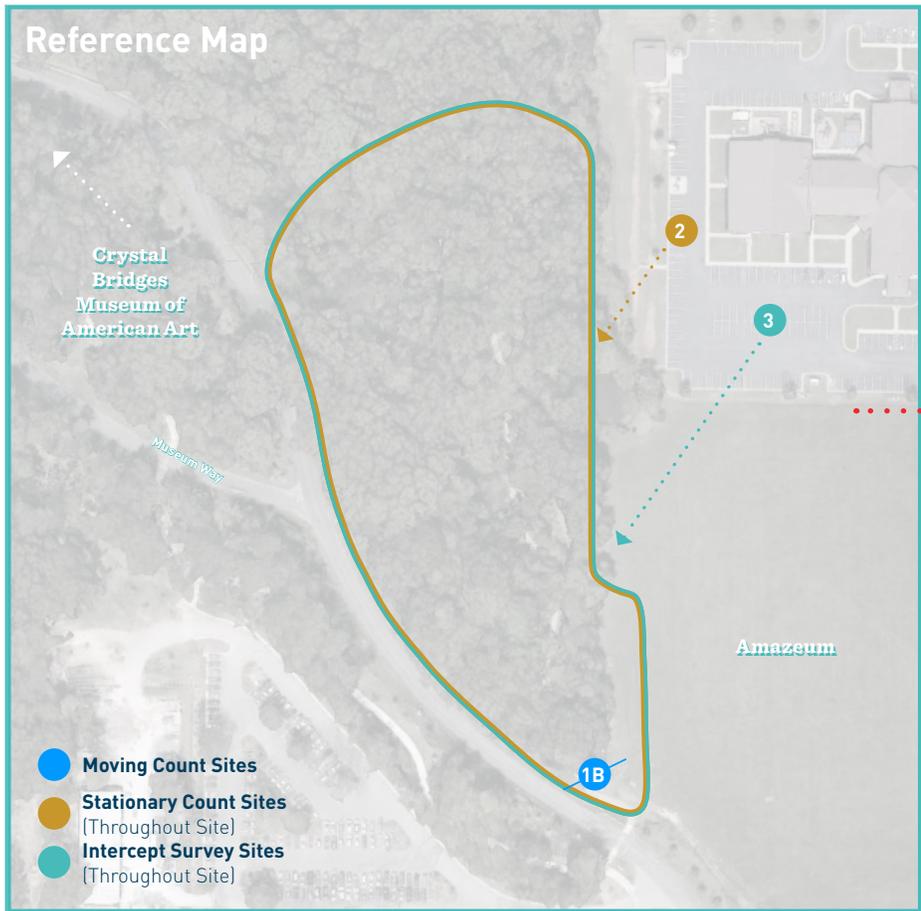
Locate where you'll be stationed for each of your methods. Select sites where you are likely to observe a lot of foot traffic — especially for your moving counts. You'll also want to consider whether you need to create multiple surveying areas on your site, depending on its size. Head to the last page in this section for tips on map prep.



MATERIALS

Identify the materials you'll need in the field. These could be general (e.g., clipboards, pens) or more method-specific (e.g., survey forms)

Data Collection Plan



▶ See next page for tips on making a map!

Method	Times	Area	Materials	
Intercept Surveys	MON 9/12 9:00AM	José	3	20x survey forms per person, clipboards, pens, phone cameras (if needed for key observations)
	TUE 9/13 12:00PM	Andrew	3	
	WED 9/14 6:00PM	Lydia	3	
	SAT 9/17 9:00AM	Lydia	3	
	SAT 9/17 5:00PM	Andrew	3	
	SUN 9/18 12:00PM	Andrew	3	
People Moving	MON 9/12 9:00AM	Lydia	2	5x moving forms per person, clipboards, pens, phone cameras (if needed for key observations)
	TUE 9/13 12:00PM	Andrew	2	
	WED 9/14 6:00PM	José	2	
	SAT 9/17 9:00AM	Andrew	2	
	SAT 9/17 5:00PM	Lydia	2	
	SUN 9/18 12:00PM	José	2	
People Staying	MON 9/12 9:10AM	Lydia	1B	5x staying forms per person, clipboards, pens, phone cameras (if needed for key observations)
	TUE 9/13 12:10PM	Andrew	1B	
	WED 9/14 6:10PM	José	1B	
	SAT 9/17 9:10AM	Andrew	1B	
	SAT 9/17 5:10PM	Lydia	1B	
	SUN 9/18 12:10PM	José	1B	

▶ Moving and Staying counts should take place on weekdays and weekends, at an even mix of morning, midday, and evening times, based on volunteers' availability

▶ Depending on the size and level of public life of a site, some may require multiple counting lines

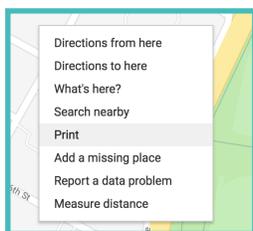
7 Steps to an Area Map

Locating sites for spatial and social observations

1 Look up your project site on Google Maps

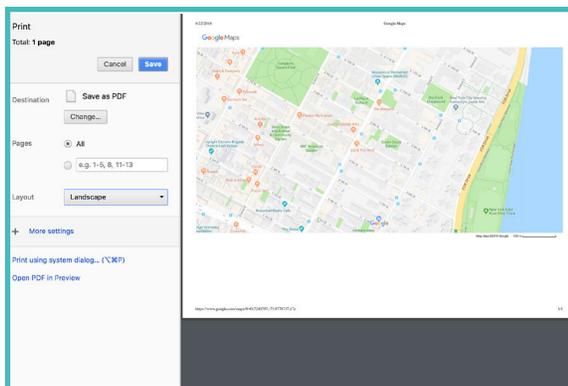
2 Zoom into the project area, getting as close as possible while including the whole site as well as nearby context

3 Right-click the map and select "Print"

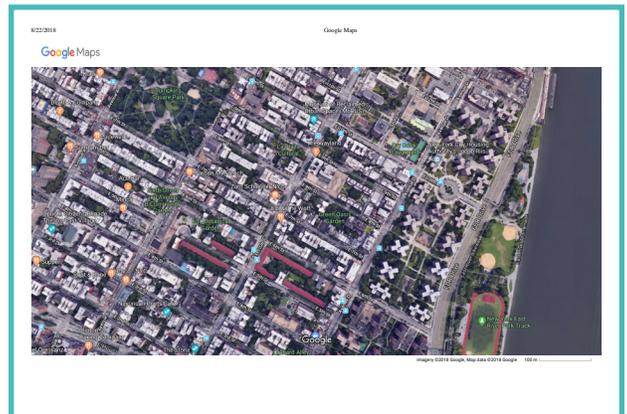
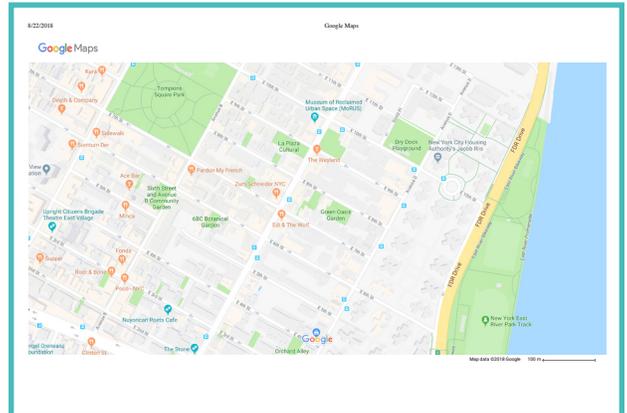


4 A preview screen will come up. Enter your project name at the top, where it says "You can enter notes here" and hit "Print"

5 A print dialogue will appear. In order to save the largest image, choose a Landscape Tabloid 11x17 paper size and hit "Open PDF in Preview."



6 The PDF will open. Save the PDF!



7 Repeat this process so that you have both aerial and street maps



Methods

Gauge Perception

Intercept Survey

*Do people find
the site easy to
navigate?*

*Do people feel
welcome there?*

*Do people feel safer
in the space?*

The Intercept Survey involves asking people at the space to respond to questions about their experience, either by filling out a questionnaire on their own or by talking to a surveyor.

Questionnaires can be completed in less than three minutes and document why people visit the space, who they've come with, what they're doing, and how they feel. They also record visitor demographic information, which helps determine if people using the space reflect the local community. Overall, the questionnaires are structured to be quick and easy to complete and spark casual conversations about one's experience.

Intercept Questionnaires can be collected before construction and after project completion. See the previous section "Putting the Methods to Work" for information on selecting survey days and times.

When planning to use intercept surveys, consider:

- ✿ **Who to survey.** Aim to obtain as many questionnaires as possible. Give priority to people spending time in the space or engaging with the project. Talk to a wide selection of people. If your project is in a busy area, you may consider asking every third person to avoid surveyor bias (i.e. only surveying people who the surveyor feels comfortable talking to). You might also engage people not at your site to understand levels of awareness, accessibility, and inclusion.
- ✿ **What to say.** Identify yourself as a project researcher. Ask if the person has three minutes to answer an anonymous questionnaire about the space.
- ✿ **Giving the survey.** You may deliver questions verbally or hand the person a form if they would like to answer the questions themselves, especially if they are concerned about anonymity. You can also ask people the questions and then give them the survey to complete the demographic section independently. When the questionnaire is complete, have the person place the form in a manila folder to ensure anonymity.
- ✿ **Collecting the completed surveys.** At the end of each survey day, collect the forms and store them in a safe, dry, private place. Enter the data into a spreadsheet.
- ✿ **Deciding on a number of surveys to collect.** The number of surveys you aim to collect will depend on your desired level of rigor. Generally, collecting 40 surveys is a reasonable goal to work toward.
If you'd like to identify how response count is related to statistical rigor, you can calculate margin of error using your survey count and the local population size, via a simple tool provided by Survey Monkey: surveymonkey.com/mp/margin-of-error-calculator/

Intercept Survey

Convergence Example

DATE
TIME
LOCATION (if relevant)

Welcome - Hi there! I'm working with the Walton Family Foundation to understand how people experience this path. Do you have five minutes to answer a few questions about your experience here? Your input will help ensure future projects best serve you and your community.

1. How often do you visit this path?

- This is my first visit
- Several times a week
- Weekly
- 1-2 times a month
- Every 6 months
- Once a year
- Less than once a year

I. Background on and Experience in the Area

2. How did you get here today?

- Walk
- Bike
- Bus
- Private car
- Taxi / rideshare
- Private bus / shuttle
- Other: _____

3. Have you socialized with anyone here today?

- Yes
- No, but I plan to
- No

4. If yes, what kind(s) of people have you socialized with, or do you plan to socialize with?

- Family
- Friend
- Acquaintance
- Stranger
- Other: _____

5. To what extent do you feel welcome in this space?

○ — ○ — ○ — ○ — ○

Very unwelcome Somewhat unwelcome Neutral Somewhat welcome Very welcome

6. Why?

II. Perception of the Area

7. How would you rate your feeling of personal safety in this area?

○ — ○ — ○ — ○ — ○

Very unsafe Somewhat unsafe Neutral Somewhat safe Very safe

8. Why?

9. What would make you feel safer in this space?

10. How easy do you find it to access and move through this space?

○ — ○ — ○ — ○ — ○

Very difficult Somewhat difficult Neutral Somewhat easy Very easy

11. Why?

12. What would make accessing this space easier for you?

13. Have you gone inside Crystal Bridges today?

- Yes
- No, but I plan to
- No

14. Have you gone inside the Amazeum today?

- Yes
- No, but I plan to
- No

III. Additional Info of Interest to Surveying Organization

IV. Demographics

15. What is your age? _____

16. What is your gender?

- Male
- Female
- Non-binary / third gender
- Prefer to self describe: _____
- Prefer not to say

17. What is your race / ethnicity? Check all that apply.

- American Indian or Alaska Native
- Asian
- Black or African-American
- Latinx
- Native Hawaiian or Other Pacific Islander
- White
- Other: _____

18. What is the highest level of education you have completed?

- Less than 9th grade
- Some high school
- Completed high school (through grade 12)
- Some college, no degree
- Bachelor's or Associate's Degree
- Graduate or Professional Degree

19. What is the combined annual income of all working adults in your household?

- \$0 - 10K
- \$11K - 15K
- \$16K - 25K
- \$26K - 35K
- \$36K - 50K
- \$51K - 75K
- \$76K - 100K
- \$101K - 150K
- \$151K - 200K
- \$201K or more

20. What is your home zip code / country of residence?

Focus Groups, Civic Engagement, Social Media

Beyond intercept surveys, there are many other ways to gauge perception among a site's users (or non-users!). You might also consider these methods:

-  **Focus Groups.** This method allows you to have a more in-depth, unstructured, and exploratory conversation about the space you're evaluating, which help get below the surface and identify deeper needs. Over the course of a 30-60 minute conversation, you can engage a key set of users (e.g., youth, seniors, marginalized communities) or a diverse cross-section of users. Be sure to set some key goals and guiding questions for the conversation, and keep the group to the time allotted.

-  **Civic Engagement.** Nearly all projects require civic engagement as part of the visioning and approval process. Additionally, using civic engagement as a platform for data collection can generate important information and powerful stories to inform evaluation. Along the way, it can build citizen capacity and strengthen working relationships with the public. Methods might include:
 - Site walks
 - Pop-ups in busy public places
 - Coffee chats
 - Events (e.g., Block Parties)
 - Workshops

-  **Social Media.** Using social media as a source of data can help reveal how people discuss the project online, and serve as a more playful record of community chatter about your project. Methods might include:
 - Promoting a custom hashtag for the project
 - Hosting "ask me anything" sessions on a project Instagram account, or on the account of a key 'influencer' in the community with a strong social media following (e.g., politician, community leader)
 - Interactive and 'Instagrammable' temporary installations on the project site that encourage selfies, and either share out important information, or prompt visitors to contribute feedback or opinions



Methods

Observe Activity

People Moving & Staying

How many people move through the site per hour?

How many people stay and linger at the site?

How are people using the space?

Social Observational Surveys document activity and movement in and around a project area. Unlike the intercept questionnaires, these are based on what can be observed, and do not involve talking to people. Observational surveys should be conducted before and after construction.

- * **Select survey dates and times** (at least two days, one before and one after). See “Putting the Methods to Work” earlier in this document for information on selecting survey days and times.
- * **Define survey area and make a map.** For the observational survey data to be reliable, it needs to be collected in a consistent manner. It’s important to use a map to ensure data is collected from the same location during each survey period. For how to make a map, see the ‘Map-Making’ section in the coming pages. Using the map, pinpoint specific ‘observation’ locations from which you can count people on all survey days.
- * **Observe life around the project area.** On days without inclement weather, conduct two types of observations:
 1. PEOPLE MOVING (10-minute counts, once each hour)
 - Tally the number, mode, age, and gender of people moving
 2. PEOPLE STAYING (not timed, once each selected hour)
 - Tally the activities that people engage in at your site
 - Tally the age and gender of people spending time in your site

These activities will be performed once each hour, starting fresh at the top of the hour. For more detailed instructions, see the sample materials in the following pages.

- * **Input your data.** After each survey day, enter all of the data from your observational surveys into a spreadsheet. The purpose is to identify a baseline that can be compared against following a post-occupancy survey.
- * **Extract key findings and define targets, if relevant.** Following the pre-construction survey, you can set specific targets for post-construction site performance (e.g., a 300% increase of people moving through your site per hour on a weekday). Targets are project-specific and should be set by the project team, taking project goals, community engagement, and baseline data into account. Findings from these measures can also impact design, revealing key gaps in the way people move through or linger in a space.

People Moving

For 10 mins, count the pedestrians, cyclists, and people on wheels who move past the counting line.

TOTAL PEDESTRIANS	TOTAL CYCLISTS
# _____	# _____

	AGE	MALE	FEMALE	UNSURE
PEDESTRIANS (people walking, running, being carried in strollers, and moving in wheelchairs)	0-4 (strollers / toddlers)			
	5-14 (kids)			
	15-24 (teens /high schoolers/ young adults)			
	25-64 (adults)			
	65+ (seniors)			
CYCLISTS (any kind)				
ON WHEELS (Skateboards, Rollerblades, Etc.)				

DATE 	TIME 	LOCATION 	WEATHER 
	START:		
	STOP:		

LOCATION:
A



SAMPLE

PROCEDURE

As you count people moving through the space:

1. **Count all pedestrians** moving across the indicated counting line, noting their age and gender as they cross — count for a total of 10 minutes.
2. **Distinguish between** pedestrians, people on bicycles, and people on any other type of smaller wheels, like scooters and skateboards.
3. **Do not ask people.** Use your observational skills to make the assessment.
4. **Tally the totals** in the light teal boxes at the end of your shift.

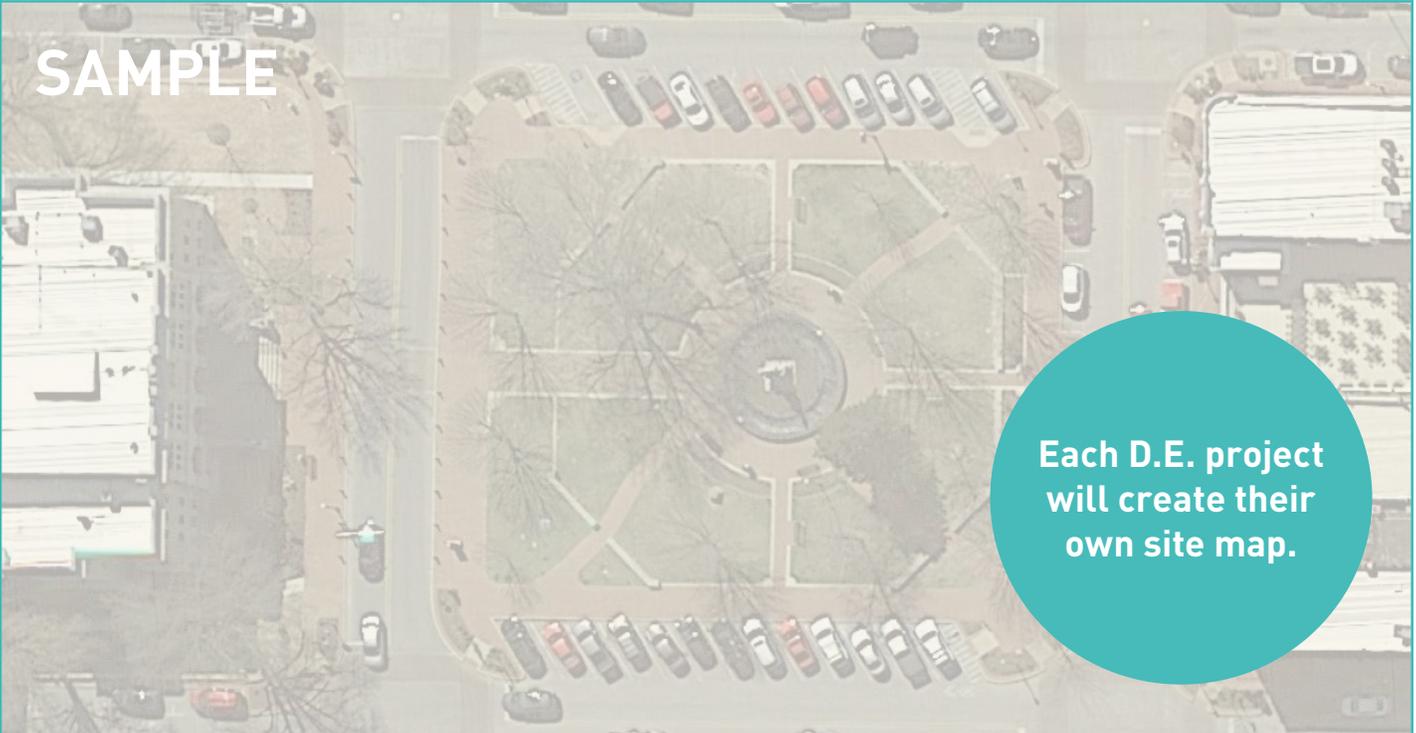
People Staying

Scan the space and document the postures and activities of the people who are staying there.

#	PERSON					ACTIVITIES																							
	STANDING	SITTING - PUBLIC	SITTING - COMMERCIAL	SITTING - PRIVATE	LYING DOWN	MALE	FEMALE	OTHER / NOT SURE	0-4 YOUNG KIDS	5-14 KIDS	15-24 YOUNG ADULT	25-64 ADULTS	65+ SENIORS	SOLO - 1	PAIR - 2	GROUP - 3-7	CROWD - 8+	TRANSIT	EATING/DRINKING	COMMERCE	CULTURAL	ACTIVE	PASSIVE	ELECTRONICS	CIVIC WORK	WORKING	SUBSTANCE USE	PANHANDLING	
1																													
2																													
3																													
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DATE 	TIME 	LOCATION 	WEATHER 
	START:		
	STOP:		

LOCATION:



SAMPLE

Each D.E. project will create their own site map.

PROCEDURE

As you map how people are using the space:

- 1. Move through a public space**, noting each person you encounter, their age, gender, posture, and activity.
- 2. Move methodically** through the space and document only the people you see as you move through the space. Do not worry about people that enter the space behind you — this is just a 'moment in time' snapshot.
- 3. Do not ask people.** Use your observational skills to make the assessment.
- 4. Walk at the same rate** each time you move through.
- 5. Tally the totals** in the bottom row of the chart when you're done mapping stationary activity.



Methods

Map Conditions

12 Quality Criteria & Place Inventory

*Does the place
make you feel:
protected?
comfortable?
delighted?*

*What are the
specific features —
natural or built —
at the site?*

*What features
are helping or
hindering people's
use of the site?*

Documenting spatial conditions helps us understand how physical features and elements impact use and activity. The methods included in this section aim to:

* **Gauge spatial perception.** Use the sample 12 Quality Criteria form to assess how you feel at the site. This is meant to capture your gut reaction and perception of safety, comfort, and delight. There is no right answer — it's a way to consider how you feel about the space, and how the design of the space impacts you.

* **Document spatial conditions.** Use the Place Inventory form to document physical conditions around the space and uncover how design may influence activity in the space.

Spatial features to document will depend on your project. They may include the following, and you could just focus on a few of these elements:

- ADA-required features
- Features for play
- Greenery
- Lighting
- Presence of crosswalks and adequate time to cross
- Presence of features that demonstrate maintenance: graffiti, litter, overall conditions
- Presence of local landmarks, symbols, and local art
- Presence and quality of bike lanes
- Presence and quality of sidewalks (separated from fast moving traffic; wide enough for two people to walk together and/or for a stroller or wheelchair)
- Presence of shade
- Public access toilets
- Quality of ground floor facades
- Quality of pavements and surfaces
- Seating, informal and formal
- Trees

12 Quality Criteria

DATE 	TIME 	LOCATION 	WEATHER 

Protection

<p>Feeling safe (protection against traffic and accidents)</p> <ul style="list-style-type: none"> • Protection for pedestrians and cyclists • Eliminating fear of traffic 	<p>Feeling secure (protection against crime and violence)</p> <ul style="list-style-type: none"> • Lively public realm • Allow for passive surveillance 	<p>Protection from unpleasant sensory experiences</p> <ul style="list-style-type: none"> • Wind / draft • Rain / snow • Cold / heat • Dust, noise, glare
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Comfort

<p>Opportunities to walk / cycle</p> <ul style="list-style-type: none"> • Room for walking • Interesting facades • No obstacles • Good surfaces • Accessibility for everyone 	<p>Opportunities to stop and stay</p> <ul style="list-style-type: none"> • Attractive and functional edges • Defined spots for staying • Objects to lean against or stand next to • Facades with good details that invite staying 	<p>Opportunities to sit</p> <ul style="list-style-type: none"> • Defined zones for sitting • Pleasant views, people watching • Diversity of seating options • Balance between public seating and café seating • Sitting alone and in groups
<p>Opportunities to see</p> <ul style="list-style-type: none"> • Reasonable viewing distances • Unhindered views • Interesting views • Easy orientation • Lighting (when dark) 	<p>Opportunities to talk and listen</p> <ul style="list-style-type: none"> • Low noise levels • Public seating arrangements that stimulate social interaction 	<p>Opportunities for play and exercise</p> <ul style="list-style-type: none"> • Allow for physical activity, exercise, and play • Temporary activities (markets, festivals, events, etc.) • By day and night • All seasons

Enjoyment

<p>Dimensioned at human scale</p> <ul style="list-style-type: none"> • Dimensions of buildings and spaces designed in human dimension, in relation to senses, movements, size and behavior 	<p>Opportunities to enjoy the positive aspects of climate</p> <ul style="list-style-type: none"> • Sun / shade • Heat / coolness • Shelter from wind / breeze • Activity and staying zones organized in relation to sun / shade access 	<p>Aesthetic qualities and positive sensory experience</p> <ul style="list-style-type: none"> • Good design and detailing • Good materials • Fine views / vistas • Rich sensory experiences: trees, plants, water • Identity and history
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Rate your perception of each of the Quality Criteria in this space, with notes and a face of your choice.



Protection

Feeling safe
(protection against traffic and accidents)

Feeling secure
(protection against crime and violence)

Protection from unpleasant sensory experiences

Comfort

Opportunities to walk / cycle

Opportunities to stop and stay

Opportunities to sit

Opportunities to see

Opportunities to talk and listen

Opportunities for play and exercise

Enjoyment

Dimensioned at human scale

Opportunities to enjoy the positive aspects of climate

Aesthetic qualities and positive sensory experience

Place Inventory

Note physical features on map provided and take photographs to document the conditions described below.

1. Please map the location of seating using the symbols provided and write how many below:

-  Benches # _____
-  Movable Chairs # _____
-  Café Seating - Private # _____
-  Secondary Seating # _____

2. Please map the location of vegetation using the symbols provided:

-  Tree
-  Planting

3. Please map the location of shade/shelter using the symbols provided:

-  Awning
-  Umbrella
-  Arcade

4. Please map the location of bike parking using the symbol provided:

-  Bike Parking

5. Please map the location of trash bins using the symbol provided:

-  Trash Bin

6. Please map the location of lighting using the symbol provided:

-  Lighting

7. Please map the location of areas to play using the symbols provided:

- P** Playground / Area that invites for play
- S** Sports Facility

8. Please map the location of water features (fountain, lake, etc.) using the symbol provided:

- W** Water Feature

9. Please map the location of public art (statue, mural, etc.) using the symbol provided:

-  Public Art

10. Please map the location of walking obstacles using the symbols provided:

-  Surface (broken paving, driveway, etc.)
-  Object (tree, seating, etc.)

11. Please map the location of physical boundaries using the symbols provided:

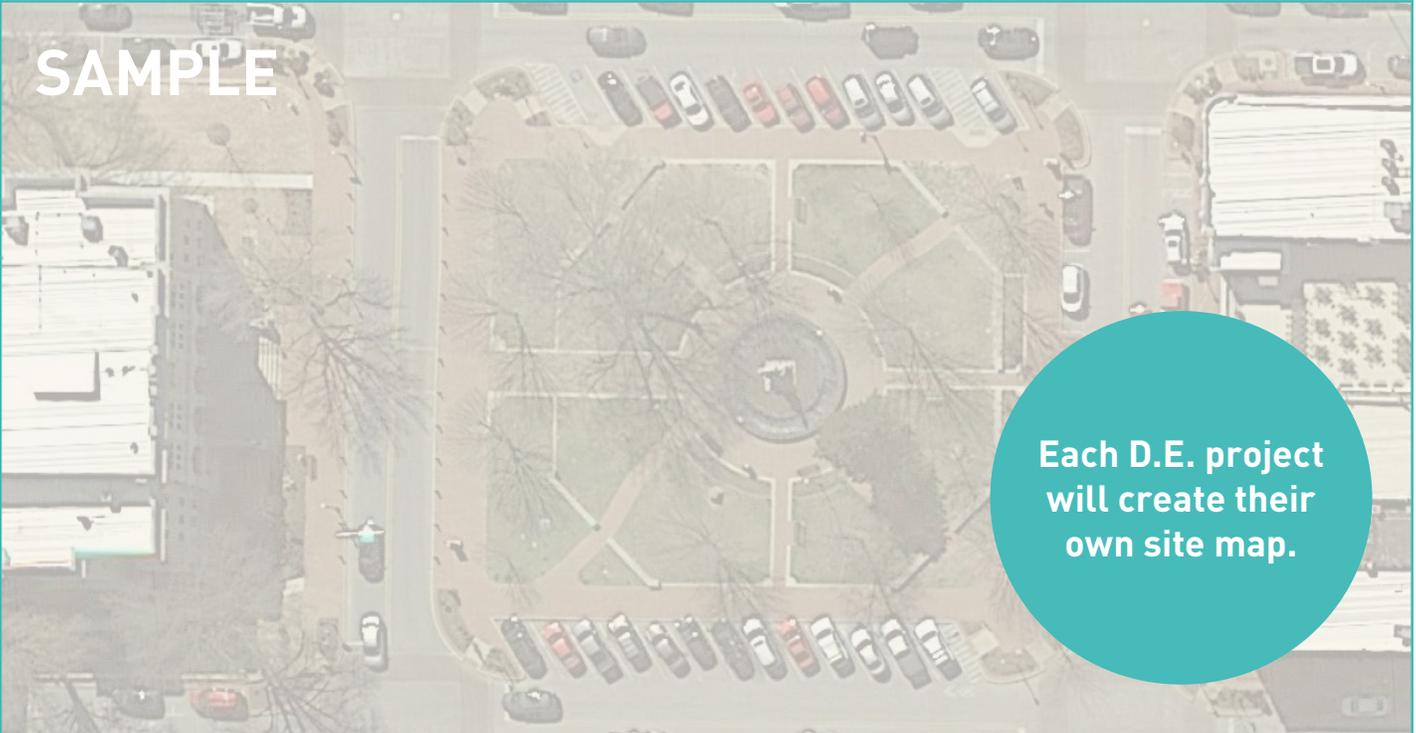
-  Boundary (fence)
-  Boundary (wall)
-  Boundary (planting)

12. Please map the location of street crossings using the symbol provided:

-  Crossing

DATE 	TIME 	LOCATION 	WEATHER 
	START:		
	STOP:		

LOCATION:



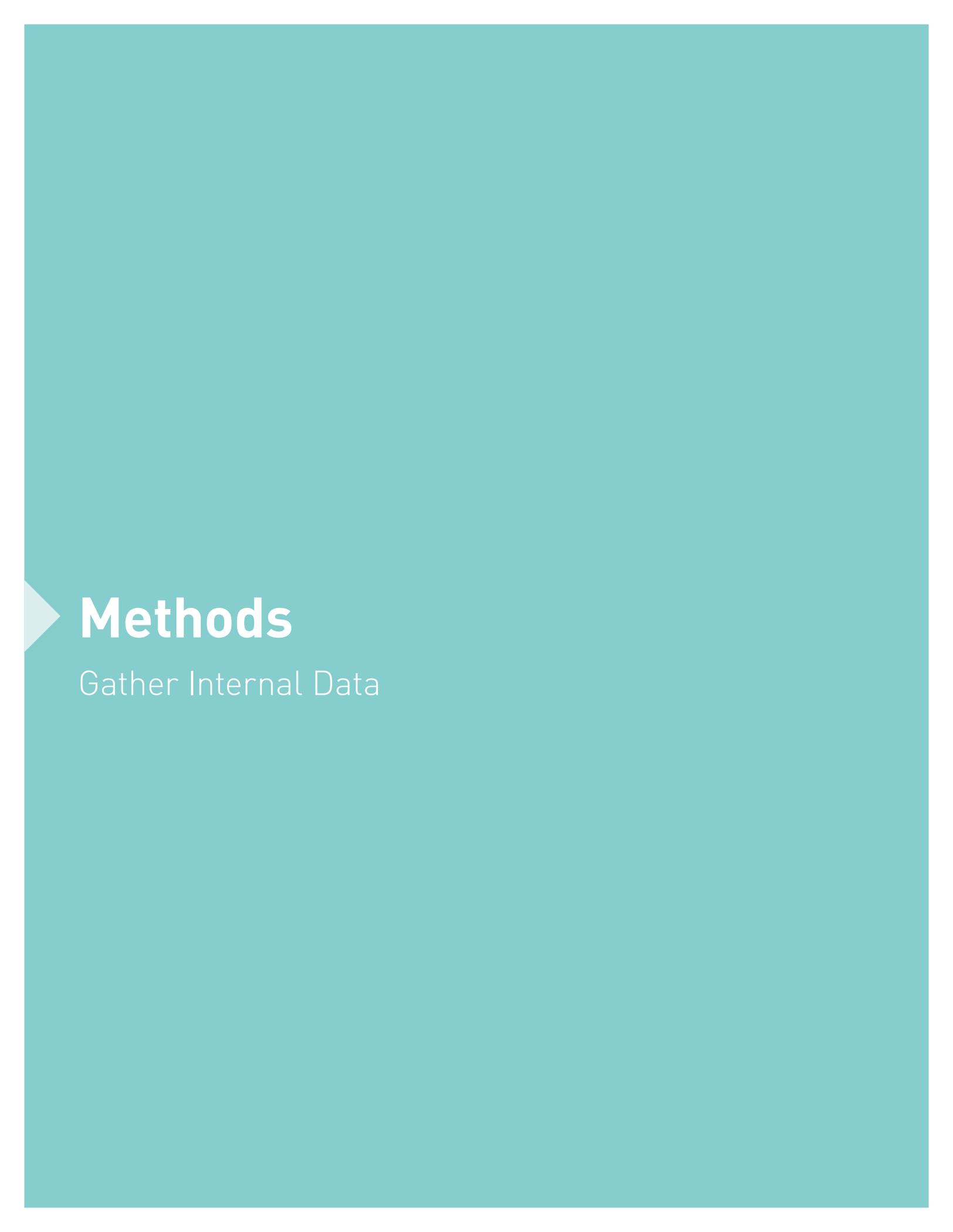
SAMPLE

Each D.E. project will create their own site map.

PROCEDURE

As you take stock of the physical features in this place:

- 1. Remember there is no set amount of time for this exercise.** If the area is large, you may need to walk through it to cover all areas.
- 2. Use the categories and symbols provided to label the physical features on the map.** You may need to develop new symbols for features that are not represented here but are particularly important to your site.
- 3. If you see more than one item** in a category (e.g., 3 benches), use the symbol and label the total (e.g., 10X)
- 4. If you're unsure about the correct category,** make notes on the map describing what you see and where.
- 5. Sum the total number of seats** for each of the four seating categories.



Methods

Gather Internal Data

Internal Data

Is the project performing on budget?

How has the project made staff's jobs easier?

How has the project integrated environmentally friendly features?

Gathering internal data helps you understand some of the “backstage” factors that shape Design Excellence in a project. In particular, you might consider:

- * **Gauge financial performance.** Check whether the project performed at or under budget, and explore what efficiencies allowed for this, so other projects can benefit, too. Also look into the ways the project design has led to ongoing financial efficiencies for the project (e.g., energy efficiencies, which also mitigate environmental impact)
- * **Explore operational impacts.** Consider how the site has eased the maintenance process and everyday work of managing the site. You might gather data on staff hours per month or per year spent on maintenance, or you might have an interview or focus group with operational staff to explore how the design has fulfilled their needs, or has fallen short of meeting them.
- * **Track environmental impacts.** Take stock of the different measures taken by designers and project leads to mitigate the site's environmental impact. This might include: local sourcing of materials; use of energy-efficient heating, cooling, or lighting; use of recycled or upcycled materials; stormwater drainage or other green infrastructure.

Gehl

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