**label:** 9

**title:** Complete a Pilot Survey Program

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Before the official start of field surveys, a pilot survey program is critical to test and refine survey tools, methods, and procedures and to provide training for field surveyors. Ultimately, pilots fine-tune the field recording process, help ensure data integrity, and provide more precise estimates of the number of field surveyors needed, associated survey equipment required, and recording times for a variety of heritage resources. Survey budget, schedule, and staffing can then be adjusted accordingly. Pilots also help shape public participation and outreach strategies and inform writing historic contexts. The pilot program may result in a revised or supplemental survey plan to address additions, revisions, or adjustments to the survey process.

## Organizing Pilot Surveys

The pilot program will represent a microcosm or subset of the larger survey effort and test all aspects of the survey process from training field surveyors to submitting final data and reports. The number and selection of pilot surveys may depend on the size and scope of the survey but generally will include a range of resource typologies and historic contexts/themes within one or more geographic areas (**fig. 9.1**). SurveyLA, for example, included three pilot surveys: two tested specific themes, and a third tested multiple themes within a large and diverse neighborhood.

**[[fig-9-1]]**

Based on the SurveyLA experience, when organizing a pilot survey program, consider surveys that test:

* **Themes that have an expected high yield of significant resources.** SurveyLA included a pilot for a subset of the city’s expansive post–World War II residential neighborhoods (**fig. 9.2**). This pilot helped establish field and research strategies for surveying postwar historic districts and assessing integrity and significance thresholds for postwar housing as a whole. The pilots also helped focus the approach for writing the post–World War II Suburbanization historic context statement.

**[[fig-9-2]]**

* **Geographic areas that have a high density of historic sites and an expected high yield of significant resources.** These pilot areas may require more surveyors, time, and other resources than less dense areas.
* **A range of topography, such as hillside neighborhoods and less accessible areas,** as these circumstances could ultimately slow down surveyors and impact estimates of survey times.
* **Themes, geographic areas, or resource types that focus on identification and evaluation of resources relating to ethnic and cultural histories.** This type of testing will assess the effectiveness of the associated outreach strategies for public participation and engagement, the success of which may vary considerably from community to community.

## Managing Pilot Surveys

The following are general tips and recommendations for managing a pilot survey program.

* An ongoing log is a critical tool for systematically tracking issues experienced during the pilot surveys. The log can be organized by categories relating to survey equipment and software, data collection and editing standards and procedures, research approaches, application of historic contexts, outreach strategies, and so forth (**fig. 9.3**). The log can also be used to track aspects of the survey that are particularly successful. Logged information could include date and time of recording, name of survey team member, summary of issue, date resolved, and notes. Use of a log can continue into the official field survey phase of a project, as was the case for SurveyLA.

**[[fig-9-3]]**

* Regular survey team meetings are advised to discuss issues encountered during the pilot survey, such as those recorded in the log referenced above. The resolution of issues can then be prioritized and assigned to team members as needed.
* The pilot survey program can help assess the general capabilities and quality of work of varying field surveyors. The information gleaned can be important in selecting the best qualified surveyors and survey teams moving forward.
* Pilot survey areas may need to be resurveyed later, or the data modified in whole or in part, based on lessons learned and revisions to survey methods. For SurveyLA, all pilot survey areas were either resurveyed or the data thoroughly reviewed and revised to ensure consistency in content and quality with all final survey results.

The pilot survey program ends with developing survey reporting procedures and report formats that will serve as prototypes for those published after the official survey phase is completed. Survey reports are discussed further in **chapter 11**.