On Surveys and Research for Planning — Remembering Patrick Geddes?

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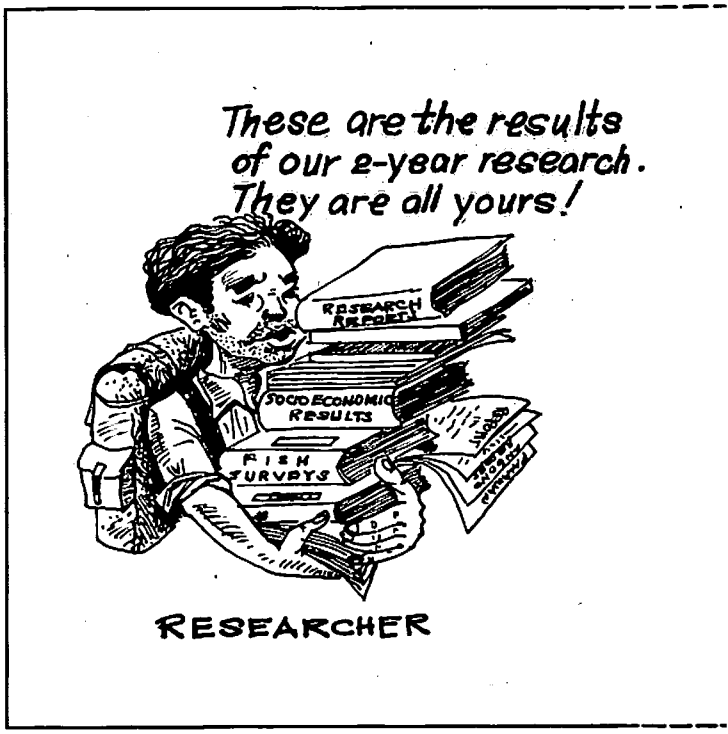
Patrick Geddes (1854-1932) is often recalled as the Scottish biologist-cum-sociologist and town planner. Although he remained on the fringes both of professional planning practice and the academia, his legacy remains as the Geddesian planning concept which still lives on: the union of thought and action, the crossing of disciplinary boundaries, the emphasis on place, the excitement to be found in understanding and guiding the evolution of cities and regions.[1] He was credited with espousing regions (traditionally a French specialty) as essential planning units. He also brought forward the idea of conducting surveys before coming up with plans, a planning philosophy popularly known as "survey before plan."[2]

The notion of "survey before plan" has taken various modes and meanings throughout my involvement in various planning activities. I had no quarrel with it when I started as a wildlife researcher in the island of Palawan, western Philippines. I was assigned to spearhead the field inventory of wildlife resources where I spent the first two years in the field identifying and counting birds, trapping reptiles and mammals and assisting during the latter stage in formal data analysis. The survey was meant to assist in planning of wildlife reserves and national parks. Thus, an inventory of the wildlife species prior to protected area planning was perfectly logical.

My understanding of "survey before plan" took a twist when I was assigned as a counterpart staff in environmental planning to a multidisciplinary (and multiracial) group of consultants. The objective of the planning exercise was to develop an "Integrated Environmental Plan" to guide the sustainable development of the entire province of Palawan. For the next six years, I was fascinated with the survey styles and research methods of the disciplinary experts I had associated with: how to assess a logging operation from the forester, a practical hands-on of environmental impact assessment from the ecologist, the personalized investigation of cultural minorities from the sociologist, the systematic way of selecting sites for nature conservation from the environmentalist, among others.



Through that planning exposure, however, I had witnessed how most consultants were influenced by the Geddesian dictum of "survey before plan." They initially demanded full-blown disciplinary surveys which they thought were absolutely essential before they could come up with management recommendations or options for development interventions. The economist demanded detailed socioeconomic surveys for cost-benefit analysis; the hydrologist insisted on more research to do computer modelling of river flows; the civil engineer required surveys on traffic flows, etc. I also cautioned that more wildlife surveys were needed before I could assist in designing the network of protected areas.

Some surveys were eventually undertaken but not as sophisticated as proposed. Further, the surveys were somehow sidetracked by the data gathering

tools preferred by the researchers. Most of the consultants were land-based specialists, e.g., forester, agronomist, land-use planner. Hence, they used tools such as satellite imageries and aerial photos that they were most familiar with for resource assessment of the terrestrial and agricultural environments. Some suggested to use rapid rural appraisal (RRA) techniques although the idea was torpedoed.

Surveys should provide quantification for the felt needs and/or problem areas identified. More often, however, the so called experts are given the leverage to choose their tools and subject of focus. Looking back, we had minimal field surveys (I joined in diving at several sites) for the coastal environments, fisheries in particular. And to think that the surrounding seas could probably be the foremost treasure of Palawan: they supply about 60% of fish consumed in Metro Manila and include 40% of the entire Philippine coral reefs. Such reflection that our surveys in Palawan should have at least equally focus on the coastal areas and fisheries came only to mind when I joined ICLARM.

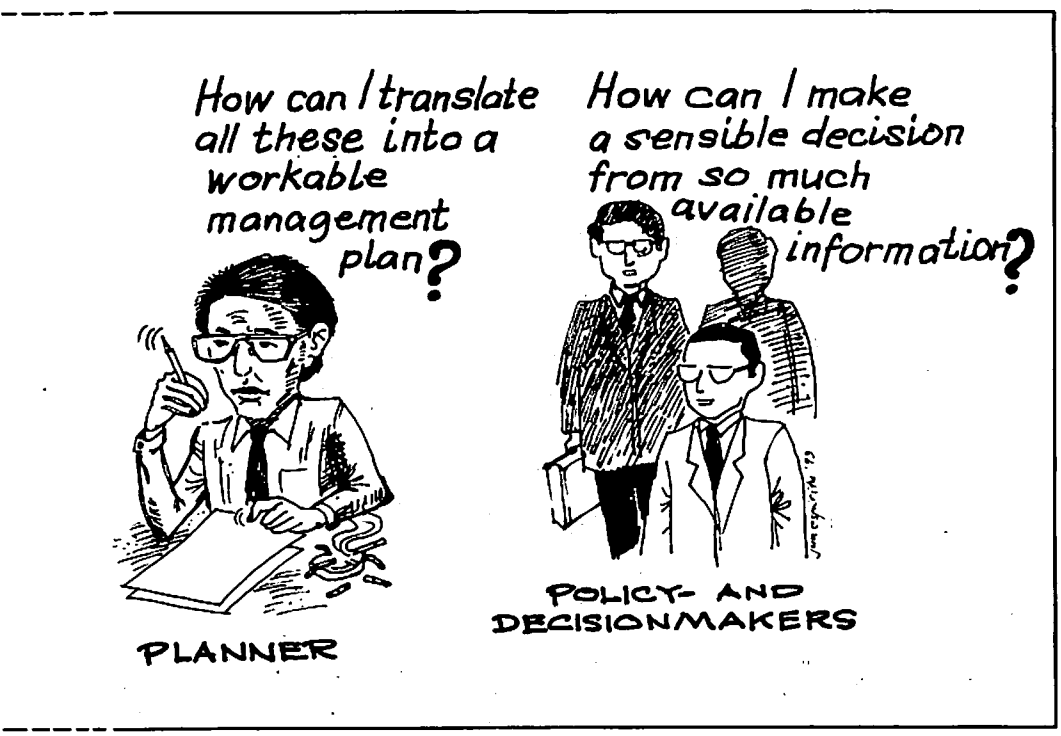
At ICLARM, I was assigned to assist in the packaging of two in-country Integrated Coastal Zone Management (ICZM) plans. Again, the "survey before plan" of Geddes haunted me while packaging those management plans. There were massive surveys and research undertaken as input to the preparation of the plans. But the emphasis of surveys was on the physical and biological aspects and less on socioeconomics, particularly sociological considerations. The surveys were not focused on the generation of relevant information to come up with the ICZM plans. On the positive side, these massive surveys led to the write up of excellent environmental profiles. However, the other essential elements of the plans, such as organization and management schemes and monitoring and evaluation systems, had inadequate databases because they were left out in the surveys.[3] The survey outputs were undoubtedly necessary databases. However, many were not directly useful in formulating the ICZM plans which were the ultimate documentary outputs.

My current planning work is the packaging of an integrated fisheries management plan for San Miguel Bay, Bicol Region V, Philippines. This is in connection with the Fisheries Sector Program of the Department of Agriculture. It is a good example of "survey before plan" where all the survey and research efforts being undertaken by ICLARM are structured to generate databases which will be used for systematic analysis of management options and/or development alternatives. There is also a proposal from another agency of the national government to conduct another coastal survey there and produce another management plan. Such zeal could be called survey and planning overkill.

Geddes was right that surveys are needed to come up with plans. But there should be systematic thinking before plunging into full-blown surveys. In short, we must carefully plan our surveys. Every effort must be exerted to look first at the surveys that have already been done, particularly the ongoing research. There are financial and specialized personnel costs in surveys, resources of which the developing world has so little.

Further, some surveys need not be too formal or elaborative to be useful for planning. There are now survey techniques such as RRA[4] which can be used for quick environmental diagnosis. There are also basic methods of policy analysis and planning[5] which can speed up the preparation of a management plan.

The job of the planner is to synthesize and draw together all the threads of the various surveys and research. Hence, it must be ensured that the survey results can ultimately be linked to the formulation or development of a workable plan.



Further Reading

[1] Auster, M. 1989. Planning and the social sciences. The Planner. 75(24):17-20.

[2] Faludi, A. 1987. A decision centered view of environmental planning. Urban and regional planning series, Vol. 38. Pergamon Press, London.

[3] Scura, L., T.E. Chua, M.D. Pido and J. Paw. 1992. Lessons for integrated coastal zone management: the ASEAN experience. p. 1-70. *In* T.E. Chua and L. Scura (eds.) Integrative framework and methods for coastal area management. ICLARM Conf. Proc. 37, 169 p.

[4] Chambers, R. 1980. Rapid rural appraisal: rationale and repertoire. Discussion paper. Institute of Development Studies, Sussex, UK.

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Technical Writing Tips

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I once lectured to a group of fisheries administrators and development workers on the mechanics of technical writing, as part of their course on Technical Writing in Fisheries.

Starting A Research Project

We began discussions using some suggestions for information steps to take before designing a research project. These include:

- *Conducting a literature search* through one or more appropriate computer databases which may be made free of charge through one agency or another. You may receive a list of abstracts or simply references relating to scientific articles published over a certain period of time, e.g., the online version of Biological Abstracts, BIOSIS, which extends back to 1969.

Computer databases, however, cover most of the literature of developed countries but often are highly deficient in developing-country literature.

This search should be supplemented by source-to-source searching, e.g., checking references in the latest articles and working backwards.

If one has a good research grant, it would pay to work forward in time in the literature search by delving into the online databases SCISEARCH or SOCIAL SCISEARCH. The databases cover only major journals, are very expensive and require hard currency for payment. The cost, however, may well be worth the results.

- *Finding out who your colleagues are.* It is helpful to make a list of authors and institutions responsible for the previous research in your chosen field.
- *Making contact with leading authors.* After your supervisor, the major authors in your field are most likely to know the present status of the field. Write and ask them if your proposed research is appropriate and perhaps ask for suggestions on the design of the project, even where to buy equipment, as well as ask for reprints of their papers, which will provide most of the background information that authors are too busy to tell you about.
- *Expanding one's knowledge of the field.* Research at the periphery may turn out to be of more interest because it is more related to your situation or perhaps because the next breakthrough could happen out there - or maybe it already has, unknown