Planning collaborative activities

Establishing a culture of participation in collaborative design is not only key to long-term success but also a significant challenge. It requires creating an environment where every voice is heard, valued and encouraged to contribute. This can be particularly difficult in contexts where hierarchical or exclusionary structures exist or when participants are unfamiliar with the process. Building trust, fostering openness and ensuring that all stakeholders have the tools and confidence to participate fully are essential. This culture of participation is not static – it is an ongoing negotiation of power, trust and respect, and it can shift over time as new ideas and challenges emerge. This transformation can be hindered by entrenched norms, biases and resistance to change, which makes the challenge of establishing a participatory culture a continual process.

Collaborative design is a dynamic and evolving process that hinges on the roles and relationships of those involved. Key figures in this process include the initiators, participants, enablers, caretakers, promoters, consultants and multipliers of a project, each bringing their unique contributions to the table. The *initiator* is the person who sparks the idea and sets the direction, while the *participants* are those who actively engage in the design process, bringing their diverse perspectives and expertise. The *enabler* provides the necessary resources, support and frameworks to facilitate collaboration, often ensuring that the process remains inclusive and accessible. The *caretaker* plays a crucial role in maintaining the well-being of the group, fostering trust and addressing emotional or interpersonal needs. The *promotor* champions the project, helping to raise awareness and engage a wider audience, while the *consultant* offers specialised advice or expertise to guide the design process with external insights. Finally, the *multiplier* extends the impact of the project by sharing the obtained knowledge and spreading the outcomes to the broader community.

These roles are not fixed and might not be suitable for every different context. Sometimes one person can play different roles or some of these aspects

might not be relevant depending on the specific case you are working with. But thinking about these organizational dimensions prior to the events is helpful in preventing frustrations and mitigating challenges.

Having a flexible and open approach towards any form of collaborative activity is extremely important for the success of the activity. However, this doesn't mean that these activities shouldn't be planned carefully. Preparing a detailed plan that considers the local context, the group you are interacting with and the goals is the first step before entering the field.

To develop a good plan, the first aspect to consider is *how to approach* the community with which you want to engage. Trust building and understanding the local context are crucial to collaborative action. In my experience, one effective way to build trust is to connect with already existing local structures that are connected to the grass roots of the community. These structures will differ depending on the context. These grass roots could be other academics who have cooperated over the long term with the target communities, residents' associations, non-governmental organisations or other initiatives that have been operating in the area. In addition, they could contribute to strategic community leadership.

These local actors can support research in many ways. First, they can provide you with valuable local knowledge that cannot be obtained through desk research, among other means of traditional research. For example, these actors may reveal their knowledge about the potential conflicts and challenges, existing structures and other hidden aspects of the local community that will be relevant for planning the collaborative activity. They can also mediate and foster trust with the local community. By connecting with actors who are already trusted by the community, our presence as researchers can be legitimised and better perceived by locals. Of course, depending on the role these actors have in their community, there is a risk that our association with them could result in negative feelings towards us. Therefore, mapping the actors and initiatives that might be interesting points of connection should be done carefully.

Cooperating with local organisations can ensure the long-term effects of planned actions. However, it is also important to consider the local actors' expectations and interests, as well as how the expected outcomes would be useful for them and their roles.

The second aspect to consider when planning collaborative activities is *who* the actors are in the community with which you would engage in the research process. Are they previously organised? Are there existing hierarchies? Are there challenges in terms of linguistic, cultural or religious barriers? What

might be the sensitive issues that you will face? Are you working with a fixed group throughout the process, or will there be some variation among the participants? Various factors, such as age, gender and group size, will also influence the selection of methods and tools for the proposed research project.

It is important to be open to the participation of different actors, but sensitive issues related to the inhabitants' contexts should always be considered. Being aware of the potential conflicts among different local groups and how to address these conflicts is especially important. In addition, understanding the local leadership, such as who the formal and informal leaders are, helps in gaining their support and in developing ways to hear from groups that are usually not actively engaged in the local decision-making processes.

Depending on the context, it might be interesting to invite facilitators to mediate the research activities. This is especially important when there are linguistic and/or cultural disparities between local and external actors. Facilitators should be able to navigate both contexts, such as being bilingual and understanding cultural differences, and should avoid positioning themselves as mere translators on the one hand or as local representatives on the other. Facilitators should mediate the research process as much as necessary but also allow room for spontaneous interactions between the participants and designers/researchers. Spontaneity may be favoured if nonverbal approaches are part of the process:

> Approaches to facilitating discussion—whether research or practice-focused—have explored the role of nonverbal communication in overcoming barriers to self-expression and communication. These approaches have been necessary to encourage creative, authentic, and legitimate discussions [McCusker, 2019], and reduced some of the barriers associated with more traditional debating approaches—for example, the most powerful or talkative person dominating meetings [Clavering & McLaughlin, 2007]. One way this can be overcome is through rethinking how exploratory events can encourage equitable engagement from a broad range of people (Tewdwr-Jones and Wilson 2022: 230).

A third aspect to consider is *where* the activities will take place. Ideally, the activities should occur in, or at least near, the local community where the future design will be implemented. However, this will depend on several factors. For example, do the participants already live there? Is it a new development? Is the necessary structure present for conducting collaborative activities? Weather

issues may also play a key role here; extreme heat or cold, weather events (e.g. storms) and other aspects of the local climate should be considered carefully. In all cases, having a backup plan for the location is highly recommended. You must also reflect on whether the methods to be used should be adapted or replaced in the case of emergent climate events.

Developing collaborations at other locations is also possible, but you must consider which tools are most suitable for imagining or representing the space. It will be important to bring as many elements as possible to support the participants in understanding the proposed space that they will be discussing during the collaboration.

Regardless of where collaborative activity takes place, it is important to previously map what is available and needed in terms of the structure, materials, number of participants and time dedicated to the activity.

Planning *how* to conduct collaborative practices is also a key element of the process. For example, what tools will be used, what are the limitations of these tools and methods, and what could be used if the original plan is unsuccessful? How much time is required for these activities? What are the needed materials and how will they be obtained? Throughout this book, many appropriate methods and tools will be explored and can be understood as starting points for the further development of approaches to fit the specific context and goals of a given project.

The final point is the *strategies to engage* the target groups and how they should be addressed. Finding a common goal or identifying the specific interests of a community in advance offers great potential for increasing their interest in engaging in collaborative research or design. When it is possible to present a concrete outcome that could be relevant to the target community, the odds that they will be willing to collaborate increase. If this outcome is known in advance – for example, through local actors – it should be clearly stated in the advertisement of the event, workshop or activity. It is important to announce realistic goals and to avoid creating false expectations.

Therefore, transparency throughout the entire process is essential in terms of ethics and ensuring the relevant outcomes of the collaborative process. It is important to share the goals, methods, uses of the results and how they could benefit the participants from the beginning of a project. Defining and reassessing expectations from all involved now and then can help ensure the mutual relevance of and engagement from all stakeholders.

Strategies to engage different groups of people will also be diverse. Children, for example, are a quite easy group to attract and engage. In most cases

they will be interested in participating in any creative activity proposed. Their parents also are often happy to bring their kids to spend some time doing something fun. Proposing activities for children can also be an interesting way to attract parents and offer parallel activities for adults. Teenagers are often a hard group to target. Specific activities developed for this group become even more necessary, as we will discuss later on in this book. In some contexts, gender also plays a role and the way of engaging groups of women for example might require different strategies than to engage men.

Social activities that extend research and design efforts are relevant tools for building trust, in addition to obtaining in-depth knowledge. We will explore this further in Part 2, but it is important to consider including social events as part of the collaborative process.

How to communicate is also relevant. In horizontal exchanges, communication should be used to create space for dialogue, which requires constant self-reflection on positionalities, power structures and the impact of your presence in the field. Communication happens not only when informing participants about your research goals or explaining the methods and expected outcomes but also during the activities, in the moments in between and during social events. Sometimes, the conversations that come with the collaborative process are more important than their specific results.

One strategy I find particularly useful is to keep a diary, where you can write down impressions, notes and other information that may not seem important in the moment but may become relevant afterwards. Notes can be taken throughout the process or at the end of each day or activity.

As mentioned at the beginning of this section, all of these plans should be allowed to change during the process. In other words, we should plan for the unexpected and understand that the planned activities will almost never happen exactly as expected; we must accept uncertainty as part of the process. Constant reflection, openness to feedback and allowing room for the unpredictable are extremely necessary when collaborating with people in the field. As will be illustrated through the many examples in this book, these unpredictable events can be opportunities to improve the collaborative process and research outcomes.

> [C]o-design is forcefully a flexible process. Flexibility is needed in planning such processes, undertaking them, and evaluating them. However, such flexibility in co-design processes has drawbacks: Co-design is less linear, more time-consuming, and more expensive than conventional processes. It

> involves more people, activities, and innovative methods, and consequently, its management is difficult but essential. Despite the above, great democratic, inclusive, and just benefits can be achieved when co-design processes embrace their challenges and pitfalls. In doing so, more context-specific projects can be achieved, more legitimate and empowering spaces can be created, and ultimately, more feasible projects can be implemented (Gaete Cruz et al. 2022: 13).

As Gaete Cruz et al. (2022) argues, real collaboration requires rethinking our time, tools and planning methods, in addition to the way we use our skills to achieve research outcomes. It also requires critical reflection on the productivity associated with our field and searching for other ways of engaging with and transforming spaces.