



PART 2

# STRUCTURE

INDIVIDUAL METHODS AND THEIR  
APPLICATION IN THE WORKING SESSIONS

The handbook is targeted at people – community members, or specific individuals appointed by local organisations or the Council – who are motivated, or employed, to engage a team of community representatives – residents, members of local groups etc. – in an active debate on their community area or neighbourhood. The aim of these persons is to help communities take the lead in the investigation of their area, establish roles and responsibilities for team members, and to become equipped to competently deal with authorities and resources that may be located outside their neighbourhood.

The handbook will explain how to organise a working team and how to carry out the working sessions in a step-by-step approach.

In total, seven stages are selected and described.

Working Session A:

#### **Goal setting**

Establishes contacts among those interested in environmental change of their area, to raise awareness, share visions, build consensus, and attribute roles among the participants in the process. This method, also described as visioning process, requires short energetic sessions of discussion.

Working Session B:

#### **Mental mapping**

Uses map drawings to identify perceptions of a place or area by overcoming preconceived ideas and studying genuine experiences, habits, aspirations of users; the process leads to the identification of priority areas where action and improvement is needed.

Working Session C:

#### **Photographic Surveys**

Uses photographs to create a visual record of issues and concerns that influence the way in which we use our environment, in order to provoke discussion about them.

Working Session D:

#### **Behaviour Mapping**

Directly observes the way in which people use particular spaces or facilities, and how the characteristics of these spaces affect the behaviour which takes place within them.

Working Session E:

#### **Selecting Design Criteria (Multiple Sorting Task, MST)**

Uses a collection of pictures to identify participant's needs and aspirations for a particular place. This method of assessment leads to the selection of design criteria which ensure that any planned improvement or change will respond to the community's own needs and aspirations; it helps challenge designers to respond to concerns beyond those traditionally raised or considered.

Working Session F:

### **Environmental Assessment**

Evaluates in the broadest sense possible the existing conditions of an area, on the basis of the selected design criteria established through use of the preceding steps. It can also allow an evaluation of the improvement and action programme identified for the same area, ensuring that the outcomes arrived at through following the handbook correspond to the needs of the whole community.

Working Session G:

### **Design Brief**

Translates the outcomes of all the previous steps into a design brief.

### **Post-Occupancy Evaluation**

After the implementation of action programmes and design schemes, it is prudent to measure the efficiency and responsiveness of the changes made, and to assess whether they correspond to the design criteria selected by the community. This assessment, called Post-Occupancy Evaluation, can be carried out using the Environmental Assessment (Step F).

The combination of all these methods is called Multi Method Strategy (MMS) and is explained in the next section.

## WHY A COMBINATION OF METHODS

Environmental experience – the way in which we perceive, get to know, adapt to and react to our environment – is a continuous and complex process. Individually each method in this handbook helps the user to study just a part of such an experience. None of the methods individually can generate the overall picture of environmental experience. Therefore all these methods are combined in a spatial and temporal sequence (Multi Method Strategy, MMS) that generates a more and more complete set of information on the environment, as experienced by the community or group of people. This leads to much more representative improvement programmes and action plans than one method on its own.

The combination of methods can target a variety of conditions, from a single community issue to the improvement or forming of a single space, a building, a public square or an entire community area. Once familiar with the methods, the working team can choose them according to specific tasks and circumstances, but the overall structure and sequence of application should stay the same. In other words, should the working team have already identified in previous work phases issues that need to be addressed in their area, they could skip some of the methods, for instance Goal Setting, Mental Mapping or Photographic Survey, and focus on Behavioural Mapping, Multiple Sorting Task and Environmental Assessment instead. However, if the team does not have any established information, or is not absolutely sure about the quality and completeness of the information available, then it should apply all methods in the sequence as suggested in the handbook.

CONFIRM & PRIORITYSE GOALS

CHECKS TO ENSURE ALL  
ISSUES AND AGENTS  
REQUIRING ATTENTION HAVE  
BEEN IDENTIFIED AND  
INCLUDED

ADDING AND CHANGING  
CRITERIA IN LINE WITH THE  
DESIGNS HELD BY THE  
COMMUNITY AT LARGE

Working Session A



### GOAL SETTING

Discussion on main goals for neighbourhood

Working Session B



### MENTAL MAPPING

Identification of 'action areas' for improvement

Working Session C



### PHOTOGRAPHIC SURVEY

Study perceptions of 'action areas'

Working Session D



### BEHAVIORAL MAPPING

Study use patterns of 'action areas'

Working Session E



### SELECTING DESIGN CRITERIA (MULTIPLE SORTING TASK)

Define design criteria for 'action areas'

Working Session F



### ENVIRONMENTAL ASSESSMENT

Collect community's views on proposals

Working Session G



### CREATING A DESIGN BRIEF

Produce a detailed design brief

THE COMBINATION OF  
METHODS PROVIDES CRITERIA  
AGAINST WHICH THE SUCCESS  
OF THE FINISHED DESIGN CAN  
BE MEASURED

## WHAT THE HANDBOOK CAN BE USED FOR

The combination of methods allows the user first of all to identify, within a community or neighbourhood area, a number of potential action areas for intervention – for instance spaces or facilities that are of major concern to different groups of the community. Then, it helps the user to identify the physical, environmental and social characteristics that such spaces should possess in order to respond to the needs and aspirations of different community groups. Finally, it can help the user to develop a brief for action (design brief), first within the community group, then by the group in collaboration with the professionals appointed by it. If no professional designers have been appointed, the handbook will assist in identifying what experience and expertise is required in such appointments.

This handbook can be used for a variety of reasons: to research and document how the community sees its neighbourhood; to generate alternative proposals to current plans for the neighbourhood; to create a local working party that, with its well established knowledge of the area, can work beside town or city council planners on programmes for the efficient development of its neighbourhood.

The application of each individual method in the following seven working sessions is described in Part 2 in a standard format:

- an introduction describing the way in which the method works and what it achieves;
- instructions to explain how to prepare for and use each method, and how to manage the working team;
- a step-by-step description of the process;
- instructions on how to summarise the findings;
- examples illustrating the application of the methods in pilot projects;
- instructions on how to present the findings and prepare for the next meeting.

# RECRUITING THE WORKING-TEAM

Whatever the reason that motivates you, before you start using the handbook, you need to establish a working team. You should always be supported by a core of people in a community whose presence, commitment and networking skills you can rely on throughout the process of applying the seven methods with the aim of establishing a neighbourhood or action plan.

It is assumed that you are aware of, in touch with, or even part of the local town or city councils, area and neighbourhood committees, forums, development or other action groups.

When building your team, it is important that it represents all interests in your community. Although every neighbourhood is different, there are a number of local groups, institutions and organisations you should establish links with. Make sure that your team 'attracts' participants from:

- local housing organisations (the council, housing associations or co-operatives, tenants' groups etc.);
- community centres/clubs (sports or cultural groups, groups of elderly people, youngsters' clubs etc.);
- health centres;
- advisory centres;
- schools;
- local retailers;
- developers/local entrepreneurs interested in economic development in your area;
- etc.

It is very hard to form a team that is fully representative of the entire community. Nevertheless, you should make sure that at least one representative

of significant groups and organisations such as those listed above and of the various age groups is a member of the working team; the discussion of a wide range of strategic, social, economic and environmental aspects of regeneration of your area are as much part of the investigation as the physical improvement of your housing stock, your parks and play areas and the provision of services and facilities. It is also very useful to have your local councillor join the working team. This means that you may need between 10 and 15 people in the working team; if the number is significantly smaller, there is the danger that the team is not fully representative of all interests of the community.

It is furthermore important for your working team members to be aware of the fact that a community per se has no budget to carry out any improvement to its area; even housing associations cannot implement a scheme unless it has been agreed upon by the relevant council departments and/or Communities Scotland. It is therefore very prudent to invite local authority departments and other public bodies to co-operate in your working sessions and advise you on the likely degree of viability of your action proposals. It is also very prudent to co-opt a professional designer (for instance an architect or landscape architect) into your team because you are about to be involved in working sessions dealing with space, planning and architecture and you are likely to need professional advice. The same professional will also be able to advise you on more strategic issues of regeneration and the likely consequences of decisions which your working team is not necessarily aware of. There are, for instance, clear economic relationships between the population density, the disposable

income and the viability of shops, schools and other services and facilities in an urban area; ignoring these interrelationships may have no immediate visible outcomes but may seriously affect your community in the long term.

A professional will also point out to you which local authority department to contact for the discussion of specific issues in your area improvement programme (e.g. the Land Department for parks, the Roads Department for traffic calming, Communities Scotland for housing improvement or new build, etc.) or which funding body to address for financial support (e.g. to get Lottery Funding for a social facility). Without discussion of your action programme with local authorities and other potential funding bodies your action programme may well remain pie in the sky. Make sure that your community is also made aware of 'these facts of life'; otherwise there will be bitter disappointment if you cannot deliver the programme in the end. Remember that consultation of the community is only successful if in the end there will be improvement action.

Another bit of advise. It is likely that different participants of your working team applying the methods in this handbook will take part with different levels of commitment at each working sessions. It is important that you maintain a level of continuity during the steps and phases of the six working sessions during which you develop your neighbourhood or action plan. Make therefore sure that those not able to attend one or the other working sessions are always fully informed about what was done and achieved in their absence.

Finally, a bit of advise to you, the process leader. You should recognise the fragility of the entire process particularly in longer-term regeneration projects. Local authority departments or governmental agencies are themselves influenced by political, social or economic change and may well today agree projects to be carried out in the next 3 to 5 years but may in the end not be able to fund them either because their budget is smaller than anticipated or because the political agenda has shifted. You, your team and the community at large should recognise this and respond to the situation with a degree of flexibility regarding your longer-term objectives. Once the team is established, you can start applying the first method: Goal Setting.