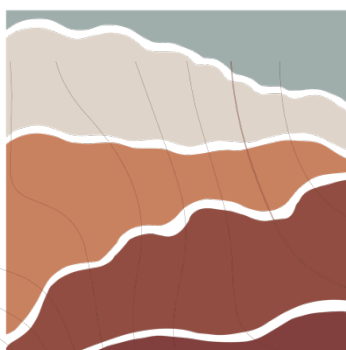


2.3 INTRA-SECTORAL INTERVIEWS and 2.4 CROSS- SECTORAL INTERVIEWS **JOINT REPORT**

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EMPATHS

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1. OBJECTIVES AND METHODOLOGY

1.1 Objectives

This report is the final result of Activities 2.3 Intra-sectoral interviews and 2.4 Cross-sectoral interviews. The aim of WP2 - “Setting the EMPATHS Framework” is to develop a new methodological framework for participatory Heritage Interpretation (henceforth “HI”) based on the research and analysis of current participatory models in use in the heritage sector and other sectors. WP2 specific objectives are to:

- Study the state of the art of existing practices of community participation and stakeholder engagement related to HI at local, European and global level;
- Identify gaps, challenges as well as strengths and opportunities of current models from within the heritage sector;
- Identify opportunities to learn from and transferable models in different sectors;
- Develop the EMPATHS Compendium which defines the methodological framework of the new participatory HI practice.

To reach this goal two series of interviews were set down to complete the definition of the state of the art on the application of participatory approaches in HI and to identify needs and gaps to fill with the EMPATHS methodological compendium:

- **WP2.3 Intra-sectoral interviews** the specific goal of is to collect 18 interviews with heritage professionals (for each piloting partner at least 90% of the Activity goals);

Partners collected 14 intra-sectoral interviews. Particularly: IE: 3; TSB: 3; HERITAGE: 3; PaFLEG: 4; EMT: 1; GK: 0.¹

- **WP2.4 Cross-sectoral interviews:** the specific goal is to collect 12 interviews with professionals from other sectors (for each piloting partner at least 90% of the Activity goals).

Partners collected 13 interviews. Particularly: IE: 2; TSB: 2; HERITAGE: 2; PaFLEG: 3; EMT: 4; GK 0.

¹ In two cases of intra-sectoral interviews, two experts were interviewed jointly in the same session (Brochu-Merriman and Seccombe-Douglas).

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1.2 Methodology

Recruitment criteria

Two kind of experts were recruited for the interviews:

Experts from the heritage sector: high-level professionals with recognised experience in using participatory approaches in heritage and involving people in heritage decision-making processes. Wherever possible, experts were selected in the specific field of HI and participatory interpretation planning².

Experts from other sectors: high-level professionals with recognised experience in using participatory approaches and involving citizens/communities in decision making processes³.

Interview Grids

In WP2.1 a desk research was conducted on the existing practices in participatory HI; the research highlighted topics and issues which needed further investigation in order to provide useful inputs to the key deliverable of the EMPATHS Compendium. On this basis, two interview grids were developed to guide semi-structured interviews with experts.

The grids were developed by TSB and finalised together with the other partners. The questionnaire was divided in the following sections:

A- general information

B- participatory methods

C- Facilitators' profile

D- Participants' management

² The experts were select amongst the partners networks; the training partners selected experts in participatory approaches applied to heritage management with a specific expertise in HI, whereas the piloting partners selected experts in participatory approaches applied to heritage management with a vested interest in the activities of the partner, but not necessarily with a specific expertise in HI. Examples of possible profiles: interpretation planners; heritage professionals working on intangible heritage; heritage professionals with experience in “difficult/contested” heritage; site managers with HI expertise.

³ Examples of possible profiles: urban planners; community developers; experts in community/territorial branding; experts in conflict prevention; social scientists; professionals with experience in public art projects; professional facilitators, educators, etc. In some cases, professionals with a background in heritage studies were still recruited as part of this group if their professional experience was in participatory methods in a broad sense.



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E-Outcome and follow-ups

F - Interpretation strategies (*for intra-sectoral interviews only*)

Each partner recorded the interviews and provided transcripts.

Due to the wide variety of backgrounds of cross-sectoral experts, not all of them were able to answer all the questions. As a matter of fact, only a part of the interviewed experts could answer section F. Other minor differences will be highlighted at the beginning of each paragraph.

Analyses

We ran a thematic analysis of transcripts to identify patterns across data; for each question, here we provide a summary of the most interesting and useful information and highlight the key findings in bullet points.

Section 2 summarises the interviewees' profiles. Section 3 and 4 present results from intra-sectoral and cross-sectoral interviews respectively. Section 5 provides final considerations, comparisons and inputs for the EMPATHS Methodological Compendium.



2. INTERVIEWEES' PROFILES

INTRA-SECTORAL INTERVIEWEES			
A.1 Name	A.2 Country of professional activity	A.3 Professional affiliation	A.4 Educational background
Kristian Bjørnstad (IE)	Norway	Norwegian Parks Association, IE, Europark, Nordic Cultural Landscapes, Cultural Heritage Association	Social sciences and human ecology
Lisa Brochu (TSB)	25+ countries: Canada, Central America, China, Korea, Japan, Rwanda, USA	Heartfelt heritage interpretation consultancy firm and former director board of the USA Association of Interpretation	Events direction and wildlife management (Brochu)
Francesco Carignani (PaFleg)	Italy	ICOM Campania Board Member	Economics of culture
Sarah Douglas (IE)	UK	Interpret Europe, AHI and Red Kite Environment	Ecology, zoology, geography, non-formal education
Maria Gkitzi (HERITAGE)	Greece	Hellenic Open University	Archaeology
Georgia Kanelopoulou (HERITAGE)	Greece	Heritage Manager in Boulouki	Environment and sustainable development
Sue Hodges (TSB)	Australia, Greece, India, Malaysia, Slovenia.	Sue Hodges Productions – heritage interpretation consultancy firm	History and public history
David Huxtable (TSB).	Australia	LookEar heritage interpretation consultancy firm	Applied Science; Wildlife and Park Management majoring in Park Planning and Heritage Interpretation
Maria Luisa Laopodi (EMT)	Greece	Cultural manager and entrepreneur	Architecture

Tim Merriman (TSB)	over 25 countries: Canada, Central America, China, Korea, Japan, Rwanda, USA	Heartfelt heritage interpretation consultancy firm and former director board of the USA Association of Interpretation	Wildlife management (Merriman)
Vito Lattanzi (PaFleg)	Italy	Demo-anthropologist of the Italian Ministry of Culture	Anthropology
Antonio Manzoni (PaFleg)	Italy	Professor Academy Of Fine Arts Of Naples	Art studies
Steven Richards- Price (HERITAGE)	UK	Professional Member of Association of Heritage Interpretation (AHI) UK (former chair), former member of Interpret Europe Supervisory Committee, former member of Interpret Europe Training Team	Languages and countryside management
Peter Seccombe	UK	Interpret Europe, AHI and Red Kite Environment	Ecology, zoology, geography, non- formal education
Dov Winer (PaFleg)	Israel	MAKASH – CMC Applications in Educations, Culture and Science / Israel	Psychology
Lars Wohlers (IE)	Germany	Interpret Europe, NAI, Visitor study association, several German heritage associations	Applied sciences with a PhD in Heritage Interpretation

CROSS-SECTORAL INTERVIEWEES			
A.1 Name	A.2 Country of professional activity	A.3 Professional affiliation	A.4 Educational background
Giulia Allegrini (TSB)	Italy	University of Bologna	Political Science and Sociology
Antonio Damasco (TSB)	Italy	Rete Italiana di Cultura Popolare (Italian network of people culture)	Anthropology
Giacomo Bandiera (PaFleg)	Italy	Municipality of Pozzuoli	Cultural Heritage Management
Laurence Bouchy	France	Independent researcher	Anthropology

Ilaria Donati (PaFleg)	Italy	COOPCULTURE	Archeaology
Eleni Dalakoura (EMT)	Greece	University of Crete	Pedagogy
Anastasia Giannakidou (EMT)	Greece	Hellenic Ministry of Culture	Archaeology and Art History
Yannis Kapetanios (HERITAGE)	Greece	Panteion University	Sociology and Social Anthropology
Stelios Margaritis (EMT)	Greece	Freelance heritage professional	History and Archaeology
Dimitris Mpardakis (HMO)	Greece	Hellenic Ministry of Culture	Archaeology
Paulin Regnard (IE)	France	INRAE	Sociology
Eugenia Tzirtzilaki (HERITAGE)	Greece	University of Thessaly / Architect-Urbanist	Architecture,
Ariella Vraneski (PaFleg)	Israel	NGO sector and academia	Urban Planning

Country of professional activity

The collected data for the **heritage sector** includes perspectives from many different countries; particularly the interviewed experts are active in the following countries: Australia, Canada, China, Central America, Korea, Germany, Greece, Japan, India, Israel, Italy, Malesia, Norway; Rwanda, Slovenia, UK, USA.

Whereas for the **professionals from other sectors** we have France, Greece, Italy, Israel.



● Intra- sectoral ● Cross-sectoral

Educational background

The interviews from the **heritage sector** showed that experts in the field of participatory approaches applied to Heritage management come from a wide variety of different educational backgrounds: architecture; anthropology; art; archaeology; countryside management; ecology; history and public history; heritage management; human ecology; languages; geography; non-formal education; psychology; social sciences; wildlife and park management majoring in heritage interpretation, zoology.

This variety is also influenced by the country of origin of the experts. For instance, those with a specific education in HI are from either Northern Europe or USA and Australia, areas where HI is considered as an established discipline.

Similarly, experts in participation **from other sectors** also came from diverse backgrounds such as anthropology, archaeology, architecture, communication sciences, geography, history, landscape studies, pedagogy, political science, urban planning, and sociology.

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3. INTERVIEWS OF THE HERITAGE SECTOR PROFESSIONALS

Section A - General information

A.6 Based on your experience, how would you synthesize in a sentence the meaning of “heritage interpretation”?

Heritage interpretation is widely recognized by the selected practitioners as a **dynamic, relational, and meaning-making process** that goes far beyond the simple transmission of facts. It is fundamentally recognized to be a process of **creation of meaningful connections** between people and their cultural or natural heritage, making it **relevant, engaging, and reflective of shared and personal values**. Heritage Interpretation should foster **emotional and intellectual engagement**, encouraging people to **reflect, interact**, and see heritage as something that **matters in their everyday lives**.

Interviewees highlighted, though, that interpretation is **not neutral** — it involves selecting and framing stories that **resonate with diverse audiences**, including local communities, visitors, and marginalized groups. It was described as a **bridge between past and present**, a way to ensure heritage remains **alive, understood, and meaningful** across generations. **Storytelling, facilitated dialogue**, and **first-hand experiences** were frequently cited as core methods, with interpretation often acting as a **form of cultural mediation** that invites multiple voices and perspectives to participate in the meaning creation.

Some emphasized interpretation’s **mission-driven character** — aiming to influence attitudes, beliefs, or behaviors — while others viewed it more as a **tool for dialogue and discovery**. Several stressed the importance of **facilitation and structured communication**, especially in participatory contexts where communities co-create meaning alongside experts. Ultimately, interpretation was seen not just as a product (like signage or exhibits), but as an **ongoing process of engagement**, rooted in empathy, relevance, and shared storytelling.



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Key Findings:

- Heritage interpretation is about **connection** — linking people to places, history, identity, and values.
- It is an **engaging, dynamic process** that fosters both **emotional and intellectual involvement**.
- **Storytelling, dialogue, and reflection** are core tools for making heritage meaningful.
- Interpretation should serve **diverse audiences**, including visitors, locals, and underrepresented groups.
- Some prioritize **first-hand, sensory experiences**, others highlight **structured facilitation** and narrative framing.
- It can be **mission-driven** (influencing attitudes or behaviours) or **dialogue-driven** (prioritizing engagement and understanding).
- Interpretation acts as a **bridge between past and present**, ensuring heritage stays relevant for future generations.
- The interpreter's role is often that of a **facilitator or mediator**, not just a presenter of knowledge.

A.7 What is your vision of what “Participation” means?

Participation is fundamentally seen by the selected experts as **an active and inclusive process that fosters engagement, knowledge-sharing, and meaningful connections**; as a matter of fact by some experts it is seen as intimately connected to heritage interpretation. Many responses emphasize that participation is not a passive experience but rather a **dynamic interaction** that involves individuals and communities in shaping heritage, decision-making, and interpretation. This engagement can take different forms, from structured frameworks to more fluid, experiential interactions.

Obviously, a key theme that emerges relating participation to heritage interpretation is the role of community involvement. Several perspectives highlight that participation enables people to connect with heritage, fostering a sense of ownership and shared responsibility. Whether through co-creation, co-design, or collaborative storytelling, participation is seen as a way to ensure that multiple voices are heard and valued. Some responses focus on participatory processes as structured and intentional,



involving levels of authority and decision-making, while others view participation more organically, as an evolving and adaptive mechanism that responds to specific contexts and communities.

On the other side, the **role of power and decision-making in participation emerges as a point of divergence** between the experts. While some perspectives highlight participation as an inclusive exchange where all voices are equal, others point to the necessity of structured methodologies that define the degree of influence participants hold. It is interesting how the majority describes **participation as a negotiation**, where experts and communities meet halfway to find a common ground, ensuring that multiple perspectives shape the final outcome. Others stress that participation is not a singular concept but exists on a spectrum, ranging from passive involvement to full co-governance.

Participation is often described as a challenge. This includes the complexity of balancing different interests, ensuring meaningful engagement rather than superficial inclusion, and adapting participation to different projects and cultural contexts. This recognition of participation as an evolving and sometimes contested process adds depth to the discussion, showing that it is not a one-size-fits-all concept but a practice that requires thoughtful adaptation.

Key Findings

- Participation is fundamentally active engagement, fostering interaction rather than passive observation.
- Community involvement is central, ensuring that people feel a sense of ownership and connection to heritage.
- Participation plays a role in knowledge creation, shaping collective understanding through dialogue and experience.
- The level of authority and power-sharing in participation varies, from passive engagement to full co-governance.
- Participation is recognized as an adaptive and context-dependent

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Section B – Participatory methods

B.1 What methodologies do you apply to facilitate participatory activities on heritage meanings and values? Can you provide any methodology specifically tailored for heritage projects (e.g. “time machine”)? Which is the most effective in encouraging participants/communities to structure and share their perceived values?

Across the interviews, practitioners described a broad and diversified set of participatory methods aimed at helping communities express their relationship with heritage. The most widely used formats include **workshops**, **focus groups**, and **participatory mapping**, each adapted to context, audience, and goal. For example, one practitioner used **cultural mapping** in village settings, linking heritage to personal stories through oral histories and interpretive walks. Another cited the **"Touching Heritage" exercise**, asking participants to bring objects of personal significance to stimulate reflection and narrative. **Role-playing and interpretive writing** also emerged as effective tools for emotionally resonant engagement, while **interactive techniques** like **multi-voting** or **map-based digital surveys** were praised for democratizing input and surfacing unexpected priorities.

Creative technologies such as **virtual reality (VR)** also proved powerful — notably in the Gunai Kurnai VR Heritage Project (Australia), where Indigenous youth connected deeply with heritage by co-producing immersive content. In landscape-focused projects, **"sense of place" analyses** allowed people to reflect on emotional and spatial attachments. In contrast, more structured formats like **online questionnaires** (e.g., via SurveyMonkey and Facebook) are seen by some as enabling broader outreach and data collection, often yielding more detailed responses than face-to-face interactions.

It is important to stress how a consistent theme was the need for **context analysis**, since many of the experts highlighted how there is not a perfect method, but the strategies for engaging communities must be adapted to each and every specific context. Methods should be tailored not only to local cultures but also to emotional dynamics, such as trauma or mistrust. The experts stressed the importance of **flexibility**, allowing participants to influence both content and process and to change the strategy if needed. Rather than using fixed templates, many preferred to **co-create**



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formats with communities, drawing from a toolbox of activities that could adapt to various sensitivities, group dynamics, and logistical constraints.

Key Findings:

- **Workshops** are the most commonly used method, often designed with phases (participant selection, structured activities, follow-up).
- **Participatory mapping** and **oral histories** are effective for surfacing place-based and intergenerational values.
- **Object-based storytelling** (e.g., the “Touching Heritage” method) allows for emotionally rich engagement, even in online settings.
- **Role-play, interpretive writing, and multi-voting** encourage reflection and collective decision-making.
- **Digital tools** (e.g., map-based surveys, online questionnaires) are especially useful for reaching broader or younger audiences.
- **VR and interactive media** can engage groups like youth who may be harder to reach through traditional formats.
- **Community landscape analysis** and **sense-of-place exercises** work well for projects that blend cultural and natural heritage.
- **Contextualization and emotional framing** are crucial — especially when dealing with sensitive or contested heritage.
- **Flexibility and adaptability** are emphasized across the board — successful facilitators tailor methods in real-time.

B.2 There is a wide variety of methods for participatory activities. How do you select the most appropriate in varying contexts?

Interviewees consistently emphasized that selecting the right participatory method hinges on a delicate balance of **contextual factors**. The three most frequently mentioned criteria were: **the project’s objectives, participant profiles, and available resources**. Practitioners repeatedly noted that **no single method fits all settings**. For example, one expert stressed the importance of aligning methods with the **goal of the session** — brainstorming, decision-making, or emotional reflection might each call for different formats. Others highlighted the importance of understanding the **demographic, cultural background, or emotional readiness** of participants —



including age, literacy levels, language fluency, and familiarity with participatory processes.

Several interviewees also spoke to the importance of **logistical and infrastructural realities**, including time constraints, budget, and digital access. One respondent working with vulnerable groups emphasized “profiling” participants in advance, while another referenced the risk of designing methods that don’t translate well from physical to digital formats. **Flexibility was recognized as a key factor**. For instance, in a politically sensitive environment, a facilitator shifted from public forums to private surveys to accommodate fear of speaking openly. Another critical consideration was **how much engagement the client or institution is truly ready to support**, as some projects had strong rhetoric around participation but little willingness to adopt participatory outcomes and, often, to build a really participatory approach could be demanding in terms of time and budget.

Ultimately, experienced practitioners approach method selection as an **iterative, responsive** process, combining pre-project research with on-the-ground adaptability. Rather than applying rigid frameworks, they advocated for **listening first, designing later** — adapting methods to local emotional landscapes, community dynamics, and evolving group needs. As regards the approach to time and budget to develop consistent context analysis, it emerged a great deal of difference between context where participatory interpretation plans are commissioned by public authorities as part of the natural process to design contents for public spaces and parks (eg. Australia and places of context/difficult heritage) and context where the heritage interpretation itself is not very well established yet.

Key Findings:

- **Project goals** are a foundational criterion: brainstorming, consensus-building, or storytelling each require different methods.
- **Participant profiling** (demographics, prior experience, emotional state) helps match methods to group capabilities and sensitivities.
- **Resource availability** (time, budget, space, technical support) directly impacts feasibility and depth of engagement.
- **Flexibility** is essential: methods often shift mid-project to better fit community feedback or logistical realities.

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- **Cultural and emotional context** matters: in politically sensitive or post-trauma settings, methods must allow for safe expression (e.g. private interviews over public meetings).
- **Level of digital access and literacy** influences whether online tools (e.g. surveys, digital mapping) are viable.
- **Existing networks and engagement history** can guide method choice—building on what's familiar avoids participant fatigue.
- **Institutional openness** to genuine engagement affects how participatory a process can realistically be.
- **Facilitators must mediate between project goals and community expectations**, often adjusting the level of community-led input.

B.3 How can contributions from experts and communities be balanced to foster meaningful collaboration and minimise the risk of disappointment?

Balancing experts and community input was recognised by the experts as one of the most sensitive — and essential — aspects of participatory heritage work. Practitioners widely acknowledged the **risk of tokenism**, where community voices are gathered but ultimately sidelined in decision-making. To avoid this, they emphasized the need for **clear structures** (also in terms of who is deciding what and of what is the people's real possibility to influence final decisions), **shared expectations**, and **early-stage co-design**. One key strategy was to embed community voices into **the entire project lifecycle** — not just the consultation phase. For example, in an Australian heritage project, community members' contributions were initially gathered but later rewritten by architects. To prevent such breakdowns, the expert expressed how it is fundamental to retain community narratives in at least a part of the final outputs.

Several interviewees advocated for **co-creation from the outset**, where experts and communities shape the project vision together. One practitioner working with Indigenous communities described a method where experts shared research during workshops, but community members were empowered to challenge, contextualize, or reinterpret it. Another example involved heritage storytelling in conflict-prone areas: external facilitators maintained neutrality and ensured that different narratives (e.g. "victors and vanquished") were equally represented.



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Importantly, many interviewees noted that **experts can unintentionally dominate** due to their confidence and institutional authority. To address this, facilitators use techniques like **breaking into smaller groups**, **active moderation**, or **inviting shy participants to share post-session**. **Trust-building was a recurring theme** — especially where communities had experienced historical marginalization. Facilitators are responsible for making space where both technical expertise and lived experience are treated as valid knowledge systems.

Key Findings:

- **Embed co-creation early:** Community involvement must start at the design phase to prevent tokenism and foster ownership.
- **Maintain transparency:** Clearly communicate how input will be used and what decisions are open for influence.
- **Structure interactions** to prevent domination by experts — use small group formats, role rotation, and one-on-one follow-ups.
- **Train experts in humility:** Professionals should see themselves as collaborators, not content authorities.
- **Use participatory storytelling techniques** that allow both expert knowledge and personal narratives to coexist (e.g. interpretive panels blending oral histories with archival data).
- **Contractual safeguards** can ensure that community contributions are carried into final outputs.
- **Facilitators act as mediators**, constantly navigating between community expectations, expert agendas, and institutional frameworks.
- **Trust and continuity** are crucial: communities are more engaged when their input is consistently respected across stages.



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Optional - B.4 How to deal with “negative” or “conflicting” values expressed by the people involved in the participatory approach

The experts⁴ emphasize that dealing with negative or conflicting values is an inevitable and essential part of participatory processes. Rather than avoiding such tensions, they advocate for **embracing conflict as a source of richness**, reflection, and deeper understanding. Tim Merriman & Lisa Brochu suggested structured consensus-building methods like **multi-voting**, which allow diverse viewpoints to surface without becoming divisive, while also helping participants see where common ground lies. Sue Hodges highlights the importance of acknowledging that **heritage is inherently political** and recommends setting clear interpretive intentions early—especially when dealing with exclusionary, racist, or revisionist views. In such cases, not all perspectives are included equally, and **ethical boundaries** must be established from the start.

Maria Luisa Laopodi stresses the role of **context-setting and emotional awareness**, particularly when dealing with trauma, identity, and contested histories. Creating a **safe space** for expression, while managing expectations about what will be included in the final interpretation, helps to avoid frustration. David Huxtable adds that facilitators must recognize that conflicts often stem from **power imbalances or misunderstandings**, and that sometimes opposition arises not from disagreement with heritage per se, but from concerns over how it's interpreted or controlled.

Steven Richards-Price notes that balance is achieved by presenting **multiple perspectives**, such as those of both victors and the vanquished in war-related interpretation, helping audiences form their own views rather than being led to a single narrative. Across interviews, the **importance of facilitation, transparency, and process design** emerges as key in diffusing tension and transforming disagreement into dialogue.

Key Findings:

- **Acknowledge conflict** as a natural and productive part of participatory heritage interpretation.
- Use **structured facilitation methods** (e.g., weighted multi-voting, group discussions) to allow diverse views to emerge and reach organic consensus.
- Establish **clear ethical boundaries** from the beginning, especially when certain viewpoints (e.g., racist, revisionist) are incompatible with the project's intent.

⁴ Some sections had some optional questions, some suggestions for giving further details. Not all the experts necessarily answered these optional questions, therefore it is made clear who answered these specific questions. For this question, answers from: Brochu-Merriman, Hodges, Huxtable, Laopodi, Richards-Price

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- Encourage **transparency and clarity** about how input will be used, managing expectations early.
- Create **safe, inclusive spaces** for difficult conversations, particularly in contexts of trauma, contested identities, or historically excluded voices.
- Use **storytelling and emotional engagement** as tools to integrate differing perspectives meaningfully.
- Facilitate **multi-perspective narratives** rather than singular or authoritative accounts, promoting reflection rather than directive messaging.
- Recognize that **conflict may stem from mistrust, trauma, or exclusion**—not necessarily disagreement with heritage content itself.

Section C – Facilitators’ profile

C.1 Based on your experience, what are the most suitable professional backgrounds of facilitators involved in participatory processes, both from heritage and non-heritage sectors?

There was wide consensus among interviewees that **interdisciplinarity** is key when it comes to facilitators in participatory heritage processes. While **heritage-specific expertise** — such as backgrounds in archaeology, museology, conservation, or cultural heritage management — provides essential grounding in content, these alone are rarely sufficient. Facilitators should possess **skills in communication, mediation, and community engagement**, often found in fields like education, social sciences, and the arts. One expert stressed the value of **cultural mediators**, particularly in diverse or conflict-affected communities. Others highlighted **artists and creative practitioners** for their ability to engage people emotionally and foster expression, especially around intangible heritage or trauma.

Several interviewees emphasized the benefit of facilitators with a **generalist or hybrid profile** — individuals with enough subject knowledge to understand the stakes, but not so specialized that they impose rigid narratives or technical perspectives. Journalism, for instance, was mentioned as a helpful background for its training in clarity, narrative framing, and synthesis. Similarly, those with experience in **community development, adult education, or even planning and architecture** were seen as useful in bridging technical interpretation with community values.



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Some contributors distinguished between **facilitators** and **interpretive planners** — suggesting that while both roles can overlap, facilitation requires stronger people skills, while planning might be more content or strategy-oriented. Nonetheless, the most successful professionals often combine both, or work in tandem with others who compliment their skill sets.

Key Findings:

- **Heritage-specific backgrounds** (e.g., archaeologists, environmental sciences, museum curators, heritage managers) are valuable but not sufficient on their own.
- **Non-heritage backgrounds** like social science, education, and community arts are crucial for effective facilitation.
- **Artists** and creative practitioners bring emotional depth, help express intangible heritage, and are especially effective with youth or marginalized groups.
- **Generalists** — with broad knowledge and high adaptability — are often more successful than hyper-specialized experts.
- **Cultural mediators** are essential in multilingual, multicultural, or post-conflict contexts.
- **Experience outweighs formal qualifications:** interpersonal ability and trust-building matter more than advanced degrees.
- Some distinguish **interpretive planners** (strategic, content-focused) from **facilitators** (process and people-focused), but both are needed in participatory heritage work.
- A **balance of heritage knowledge and social engagement skills** is the ideal.

C.2 What specific soft / personal skills are required of facilitators in these contexts, and how are these skills cultivated?

It was recognised that facilitators in participatory heritage processes need a refined and deeply human set of **soft skills** to navigate emotional landscapes, group dynamics, and cultural complexity. **Empathy** was the most frequently cited skill, described as the foundation for building trust, understanding diverse viewpoints, and managing emotionally sensitive topics. Equally important is **active listening**, which



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allows facilitators to pick up on subtle cues, validate participant input, and adapt the process in real time.

Communication skills were universally valued — not just speaking clearly, but also **moderating discussions, synthesizing diverse perspectives, and reframing conflict constructively**. Many emphasized the need for **emotional intelligence**: the ability to recognize, regulate, and respond to emotions (one’s own and others’) while maintaining a safe and inclusive atmosphere. **Adaptability and humility** were also key traits — particularly when plans need to shift or when facilitators must step back to let community voices take the lead.

It was highlighted how facilitators working in difficult or contested heritage settings could also need **conflict resolution and mediation** skills. This includes managing power imbalances, handling disagreement diplomatically, and ensuring that no single group dominates. Additional soft skills mentioned included **patience, curiosity, humor, neutrality, and self-awareness** — all of which contribute to creating a space where participants feel respected, heard, and empowered.

These skills are cultivated through a mix of **on-the-ground experience, reflection, mentorship**, and, in some cases, **training in communication or adult education**. Several interviewees emphasized that while some facilitators may have a natural talent for this work, all of these abilities can and should be developed over time.

Key Findings:

- **Empathy** is essential for trust-building and navigating emotional narratives.
- **Active listening** ensures all voices are heard and valued — especially quieter or marginalized ones.
- **Strong communication** includes clarity, moderation, synthesis, and reframing in group settings.
- **Emotional intelligence** helps facilitators manage tense moments and diverse reactions.
- **Adaptability and humility** are key for responsive facilitation — especially when navigating unexpected dynamics.
- **Conflict resolution skills** are critical in polarized or politically sensitive contexts.



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- **Other valued traits** include patience, humor, neutrality, curiosity, and self-awareness.
- These skills are cultivated through **practice, mentoring, reflective facilitation**, and sometimes **formal training** in adult education or group dynamics.

C.3 When working in multidisciplinary teams on co-creation projects, what expertise should be included (e.g. social scientists, psychologists, anthropologists etc)?

Multidisciplinary collaboration is seen as **essential** in participatory heritage work, allowing projects to respond to the social, cultural, psychological, and technical dimensions of heritage management. The most frequently mentioned disciplines were **social sciences** (especially sociology and anthropology), **psychology**, and **education**. These professionals bring insight into **group dynamics, emotional engagement**, and the **cultural significance of lived experience**. For instance, anthropologists are valued for helping interpret intangible heritage, while psychologists can support projects dealing with trauma, intergroup conflict, or emotional expression.

Heritage professionals (e.g., historians, environmental scientists, archaeologists, curators) remain vital for providing content and context, but are often complemented by **designers, artists, or architects**, particularly in projects that result in physical or digital interpretive outputs. One respondent emphasized the importance of **interpreters** as "connective tissue" — able to synthesize diverse inputs into coherent narratives. In projects involving community well-being or identity, the inclusion of **governance experts, community developers, or facilitators trained in stakeholder engagement** is also advised.

Many interviewees also stressed that beyond formal expertise, team members should bring **collaborative mindsets** and the ability to **translate across disciplinary "languages."** This includes being open to lay knowledge, resisting disciplinary hierarchies, and working towards shared ownership of outcomes. Some also suggested that **pairing content experts with creative or communication specialists** improves the impact of participatory interpretation, particularly when working with broader audiences.



Key Findings:

- **Anthropologists and sociologists** help contextualize heritage within community and cultural frameworks.
- **Psychologists** are important when addressing trauma, memory, or emotional processing in heritage work.
- **Educators and adult learning specialists** support inclusive, accessible engagement strategies.
- **Designers, artists, and architects** contribute to visualizing, shaping, and implementing interpretive content.
- **Historians and heritage professionals** remain core to ensuring content authenticity and rigor.
- **Facilitators and stakeholder engagement experts** support process management and inclusivity.
- **Cross-disciplinary communication** is critical: team members should be able to “translate” between fields and perspectives.
- **Collaborative attitudes and emotional intelligence** are as important as disciplinary background.

C.4 Should the facilitator be a person internal to the heritage institution/ the local context, or is it better to involve an external figure with a more detached perspective? Is it advisable to involve professional facilitators, and if so, in which circumstances?

There was no one-size-fits-all answer to this question — rather, interviewees agreed that the choice between an internal or external facilitator depends heavily on **context**, **project sensitivity**, and **existing relationships** within the community. Internal facilitators often have the advantage of **local knowledge**, **institutional memory**, and **strong community ties**, which can foster trust and continuity. When institutions already enjoy positive relationships with local stakeholders, internal facilitators may be best positioned to motivate participation and build on existing momentum.

However, in situations involving **conflict**, **mistrust**, or highly **sensitive heritage topics** (e.g. colonial legacies, traumatic histories), external facilitators are preferred.

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They are seen as **neutral mediators**, unburdened by local politics or historical tensions, and better able to create safe, inclusive environments. One interviewee described a Northern Ireland project where external facilitation was critical due to entrenched political divisions. Others noted that **external professionals can “ask the stupid question”** — prompting important discussions that insiders might hesitate to raise.

Several contributors advocated for **blended approaches**, where internal and external facilitators work together — combining insider trust with outsider objectivity. In multicultural or multilingual settings, involving **professional facilitators** (with experience in group dynamics or conflict mediation) was seen as not just helpful but sometimes essential.

Ultimately, the best choice depends on **institutional culture, topic sensitivity, power dynamics**, and whether the project requires **relationship building or conflict navigation**.

Key Findings:

- **Internal facilitators** bring contextual knowledge, continuity, and trust — effective when community relations are strong.
- **External facilitators** bring neutrality and fresh perspective — essential in situations involving tension, trauma, or institutional distrust.
- **Blended models** (internal + external teams) can offer both credibility and objectivity.
- **Professional facilitators** should be brought in for complex dynamics, contested heritage, or multi-stakeholder negotiations.
- External facilitators are often more willing/able to **ask difficult or “naive” questions** that provoke deeper reflection.
- The **facilitator’s credibility** depends not just on origin but on their ability to be empathetic, informed, and inclusive.
- When dealing with **identity, trauma, or conflict**, neutrality and detachment are more important than local familiarity.



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Section D – Participants’ management

D.1 What methods can be used to recruit and select people for participatory activities? How does the recruitment process influence the quality (positively or negatively) of engagement and the composition of the group? Please give at least one example

Recruitment is seen as a **critical success factor** in participatory heritage projects — directly influencing the diversity, cohesion, and quality of engagement. However, some experts coming from contexts where the participatory interpretation is well established and institutionalised (e.g. Australia), explained how in this kind of contexts the selection of the participants might be developed by the “clients” of the interpreters that are indeed often hired by public authorities or managers of sites and parks.

Most interviewees agreed that there is no universal method; instead, **recruitment strategies must align with the project’s goals, target audience, and context**. A range of techniques was described, including **pre-selection via questionnaires**, **open calls**, **partnering with local institutions (e.g. schools or cultural groups)**, and **snowball sampling** or “rolling invitations” where participants refer others.

For more structured workshops or co-creation processes, practitioners emphasized the value of **intentional group design**. One interviewee described using initial surveys or interviews to identify participant profiles and avoid potential clashes. Another stressed the importance of selecting people based on **their relationship to the heritage at stake** — whether through proximity, expertise, or emotional connection. In politically or socially sensitive settings, facilitators preferred to **tap into existing networks** or events to avoid walking in “cold” and risking distrust or low turnout.

Several respondents pointed out that **recruitment shapes group dynamics**. Poorly selected groups may include disengaged individuals, derail discussions, or exacerbate tensions. Conversely, thoughtful recruitment can lead to more inclusive, productive conversations and a richer range of perspectives. One facilitator emphasized that mismatched groups require more energy to manage and may lead to participant withdrawal.

Interestingly, while some favoured open, inclusive recruitment, others warned of the risks of involving people who only represent personal interests or have disruptive



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agendas. In such cases, smaller, curated groups — or phased involvement — may be more effective.

Key Findings:

- **Recruitment method should align with project goals and the community context.**
- Common techniques: pre-event surveys, open calls, partnerships with local institutions, snowball sampling, and tapping into existing events.
- **Pre-selection tools** (e.g. questionnaires, interviews) help match participants to process needs and reduce risks of conflict or disengagement.
- **Partnering with schools** or pre-existing community groups is effective, especially when working with youth or structured communities.
- **Existing networks** provide credibility and increase participation rates, especially in sensitive or historically underserved contexts.
- **Poor recruitment affects engagement quality** — leading to imbalance, resistance, or even project failure.
- Group design should consider **diversity, trust, balance, and representation** — not just numbers.
- When needed, **phased involvement** can gradually expand participation and mitigate risks.

D.2 Should individuals with little or no interest in heritage or community life be engaged in these activities? If so, what strategies can facilitate their meaningful involvement? Please give at least one example

Most interviewees agreed that people who initially show **little or no interest in heritage** should not be excluded from participatory activities. On the contrary, several saw these individuals as a **valuable audience to engage**, often offering **fresh perspectives**, surfacing overlooked narratives, or reflecting **broader public indifference** that heritage projects aim to address. However, their meaningful inclusion requires **carefully designed strategies** that can connect heritage to their **personal lives, emotions, or everyday experiences**.

One frequently cited approach is to **frame heritage through themes that matter to people** — such as identity, place, memory, or change — rather than through formal



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definitions or academic discourse. For example, using **personal storytelling**, **object sharing**, or **creative prompts** (e.g., “What item would you put in a museum from your home?”) can draw out unanticipated heritage connections. Several facilitators described **group mixing techniques**, placing less engaged participants with more enthusiastic peers to encourage positive social dynamics.

In cases where participants are resistant or disruptive, facilitators emphasized the need for **flexibility and empathy**. This might mean offering **lower-stakes entry points** (like informal discussions or art-based activities) or providing **space to observe before contributing**. Others highlighted the importance of **emotional intelligence** in understanding why disinterest exists — often linked to prior negative experiences, social exclusion, or a lack of culturally relevant narratives.

Still, some interviewees noted that if individuals are **openly hostile or fundamentally uninterested**, they should not be forced to participate, as this can derail the process. Instead, these people might be engaged in later phases, once trust is built and the relevance of heritage is clearer.

Key Findings:

- **Disinterested individuals should be included**, but strategies must be tailored to their needs and motivations.
- Use **personal storytelling**, **object-based activities**, or **emotionally resonant themes** to create connections.
- **Group dynamics** matter — mixing participants can foster peer learning and increase engagement.
- **Facilitators must explore the reasons behind disinterest**, which may include exclusion, trauma, or alienation from dominant heritage narratives.
- Offer **low-barrier entry points** like creative tasks or informal dialogue.
- Avoid forcing participation: **phased or optional involvement** may be more appropriate for some individuals.
- Some level of **scepticism or disengagement** is normal and can even add value when constructively managed.



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D.3 What strategies can effectively engage high-level decision-makers in the interpretation processes? Are there general approaches that transcend contextual differences?

Engaging high-level decision-makers — such as local politicians, institutional leaders, or funding bodies — in participatory heritage processes is both essential and challenging. Interviewees noted that these figures often operate within **tight schedules, political constraints, or bureaucratic hierarchies**, which makes full participation in grassroots processes unlikely. However, their **buy-in is crucial** for the success and sustainability of interpretive initiatives. In some contexts (Australia and USA) where participatory heritage interpretation is well established the high-level decision maker could be the authority commissioning the interpretive plan; obviously these are often the most successful examples.

Generally, the most successful engagement strategies involve **early and targeted outreach**, typically through **one-on-one meetings, private briefings, or inviting decision-makers to key milestones** rather than expecting their attendance at public workshops. Facilitators stressed the importance of **framing heritage work in terms of strategic priorities** — such as tourism, social cohesion, education, or regional development — so that decision-makers understand its relevance to their agendas.

Several respondents emphasized **creative engagement methods** that go beyond formal meetings. One facilitator described how **interpretive exercises and hands-on activities** helped bureaucrats “come out of their shell” and connect emotionally with the content. Others mentioned **site visits, storytelling sessions, or exposure to successful case studies** as ways to build understanding and interest.

A recurring theme was the need to **identify and work through power structures**, often using **community influencers or institutional liaisons** to open the door to decision-makers indirectly. In politically sensitive contexts, some practitioners found that engaging decision-makers publicly could be counterproductive, and opted for **discreet background involvement** instead.

Key Findings:

- **Early, private engagement** is more effective than expecting high-level actors to attend group sessions.

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- Connect heritage interpretation to **broader strategic priorities** (e.g. development, tourism, education) to gain relevance.
- Use **site visits, hands-on exercises, or storytelling** to foster emotional connection and break bureaucratic distance.
- Leverage **intermediaries and power-mapping** to identify how and when to involve decision-makers.
- Avoid situations where decision-makers feel they must defend positions in public — **confidential briefings** are often more productive.
- In some cases, high-level involvement is best kept **symbolic or advisory**, with operational decisions delegated to more flexible project teams.
- **Cultural and political context matters** — approaches must respect local power dynamics.

D.4 How can visitors to heritage sites be effectively engaged in interpretive processes?

Engaging visitors in interpretive processes requires moving beyond passive information delivery toward **interactive, experiential, and participatory formats**. Interviewees emphasized that visitors — especially those unfamiliar with a site's deeper significance — benefit most when interpretation invites them to **connect emotionally or intellectually**, rather than simply consume facts. Techniques that foster **dialogue, reflection, and agency** were consistently highlighted.

Importantly, practitioners advised tailoring methods to the **visitor profile**: occasional tourists, school groups, and local return visitors each require different engagement strategies. As a matter of fact, the most useful way to engage visitors in the meaning creation process is recognised in understanding what the visitors need.

This could be done by applying a structured methodology developing surveys and interviews to be developed after the experience in the sites. The recognised problem is that these kinds of surveys could be demanding in terms of time and budget management. Moreover, it is acknowledged that often visitors are not really keen to spend time for interviews and their answers can often be biased by the desire to finish quickly or to please who is conducting the survey. A possible solution is given by some of the experts who suggested understanding visitors' needs by devoting some time to direct observation (some suggest a "fly on the wall approach"). Simply by spending



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some time observing people's behaviour in a given space could give very important and useful hints to the interpreters.

Key Findings:

- Move from passive to **active, dialogic interpretation** — invite reflection, questions, and multiple viewpoints.
- **Storytelling and lived experiences** resonate more than institutional narratives — use first-person or community voices.
- Use **visitor feedback or observations** to inform and refine future interpretive strategies.
- **Direct observation** can be a very powerful method to understand the visitors' needs.

Optional – D.5 What strategies can be employed to identify and manage conflicts among stakeholders during participatory activities?

It was recognised⁵ how conflict among stakeholders in participatory heritage projects is often **unavoidable**, especially when dealing with **contested narratives, differing priorities, or unequal power dynamics**. Across the interviews, experts emphasize that the **first step in conflict management is early identification**, which hinges on **active listening**, careful stakeholder mapping, and understanding **community dynamics**—both formal and informal.

David Huxtable suggests that many conflicts arise from **miscommunication or differing interpretations of project goals**, which can be addressed through **clear role definition and direct, respectful dialogue**. He shares an example where a previously supportive stakeholder publicly criticized a project—something later resolved through a **private follow-up conversation** that restored trust.

Sue Hodges points out that facilitators must be equipped with **conflict management and conceptual thinking skills** to help them decode deeper motivations behind surface-level tensions. She also advocates for **breaking large groups into smaller ones** to give quieter or underrepresented voices space to be heard, reducing the dominance of outspoken individuals—especially in culturally hierarchical settings.

Maria Luisa Laopodi adds that conflict sometimes emerges from trauma or unhealed collective memory, especially when communities feel their identity is challenged. In such cases, **empathy and emotional intelligence** are critical. She notes that **contextualizing conversations**, setting **clear participation goals**, and **acknowledging diverging values without attempting to immediately reconcile them** are powerful tools for de-escalation.

⁵ Answers from Hodges, Huxtable and Laopodi

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Facilitators should remain **neutral yet assertive**, sometimes involving **external mediators** or designing **parallel engagement tracks** to ensure that conflicting groups can participate meaningfully without direct confrontation. Importantly, these professionals stress that **process design is key**—when stakeholders know how their input will be considered and what the boundaries are, much of the tension can be diffused early.

Key Findings:

- **Identify conflicts early** through stakeholder mapping, informal observation, and active listening.
- Clarify roles, project goals, and decision-making boundaries **from the outset**.
- Use **private dialogue or mediated conversations** to de-escalate public or emotional tensions.
- Break large groups into **smaller, focused sessions** to reduce dominance and improve inclusivity.
- Equip facilitators with **conflict resolution skills**, empathy, and awareness of social dynamics.
- Allow space for **parallel or phased engagement** if direct confrontation between groups is risky.
- Acknowledge rather than suppress divergent views; **transparency and inclusion help reduce mistrust**.
- Recognize that conflict often reflects **deeper emotional or historical tensions**, not just disagreement.

Optional – D.6 What methods can be used to balance diversity and representation in a working group? What group size is manageable? Is it preferable to involve a large, diverse group or a smaller, more focused set of participants?

The two experts⁶ generally agree that achieving balance in diversity and representation is a **delicate yet vital part of participatory heritage work**. The effectiveness of participation depends not just on who is in the room, but also on **how power, voice, and attention are managed** within that group. Several professionals stress that there is **no one-size-fits-all answer**—the ideal group size and composition should be shaped by the **goals, topic, and context** of the project.

Sue Hodges points out that **smaller groups often allow for deeper engagement**, while larger groups risk domination by louder voices, particularly in hierarchical or rural settings. She gives the example of how women in a community only started speaking after a dominant male participant left the room—highlighting the importance of **group**

⁶ Answers from Hodges and Laopodi

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composition and facilitation techniques (like small group breakouts) to promote equitable participation.

Maria Luisa Laopodi agrees, suggesting that **thematic relevance should guide group size**: broad topics like democracy may benefit from large gatherings, while sensitive or complex issues require **smaller, focused groups** for in-depth dialogue. She also emphasizes that facilitators must **adapt expectations and evaluation metrics** based on group size—large groups foster visibility and collective legitimacy, while small groups support nuance and trust-building.

In terms of methods to ensure balanced diversity, practitioners recommend **targeted outreach, iterative recruitment**, and using **trusted local liaisons** to reach underrepresented voices. However, as Laopodi notes, the real success of recruitment lies not just in outreach channels, but in **crafting compelling narratives** that resonate with different demographic groups and motivate them to participate.

Ultimately, diversity must be more than demographic—it also includes **diversity of experience, knowledge systems, and emotional relationships to heritage**. Careful facilitation, thoughtful group design, and strategic storytelling can help ensure **meaningful representation over mere inclusion**.

Key findings

- **Smaller groups** are often better for in-depth discussion and managing power dynamics; **larger groups** may serve awareness-raising or symbolic goals.
- Use **breakout sessions** in larger groups to avoid dominance and give space to quieter voices.
- **Recruitment strategies** should be iterative, story-driven, and tailored to specific communities' interests and ways of engaging.
- Engage **community liaisons** or connectors to reach underrepresented or marginalized groups.
- Match group size and diversity to **the nature of the topic** and the **depth of engagement desired**.
- Balance **demographic representation with diversity in experience, expertise, and cultural connection**.
- Adjust facilitation style and success metrics depending on whether the goal is **breadth or depth**.



Section E – Outcomes and follow-ups

E.1 Based on your experience, how can we keep communities engaged in the long term, even after the end of the participatory activities? Beyond seeking feedback or approval, are there other strategies that enhance commitment in the long term? What tools could be used to empower citizens in interpreting their heritage autonomously? Please, give an example

Sustaining community empowerment beyond the lifespan of a project was a concern shared across all interviews. Practitioners agreed that short-term participation is **not enough** — for communities to remain engaged and empowered, they must be given **ownership, continuity, and meaningful roles** beyond the initial engagement phase. This means **embedding participatory structures into long-term governance, sharing decision-making power, and ensuring that communities see their input reflected in outcomes.**

One recurring strategy is to establish **local advisory boards, community forums, or ambassadors** who can continue engagement efforts, represent community voices, and serve as connectors between institutions and residents. Another is to **create follow-up opportunities**, such as annual meetings, newsletters, or volunteer programs — even something as simple as keeping participants informed of project outcomes through email can make a difference.

Some interviewees also described co-developing **educational programs, heritage trails, or community exhibitions** that remain in use after the project ends, fostering a sense of shared legacy. Others emphasized the importance of **capacity-building**, such as training locals in facilitation, storytelling, or guiding — helping communities become active agents in heritage interpretation.

However, long-term empowerment also requires **systemic support**: political will, institutional resources, and a culture of inclusion. Without a long-term host or “champion” — whether a person, organization, or platform — even the best participatory work can fade. Several interviewees spoke candidly about the difficulty of maintaining momentum once funding ends or staff turnover occurs.

Key Findings:

- **Post-project structures** (e.g. advisory groups, forums, community roles) help maintain engagement.

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- **Visibility of community contributions** in the final output is key to lasting empowerment.
- **Capacity-building efforts** (e.g. training in interpretation, guiding, digital skills) turn participants into facilitators.
- **Follow-up activities** — newsletters, reunions, updates — sustain interest and reinforce relationships.
- Co-created outputs like **heritage trails, exhibitions, or educational kits** serve as lasting legacies.
- **Continuity and credibility** are critical: if communities feel “used and dropped,” trust erodes quickly.
- **Political and institutional support** is needed for sustainability — projects must be embedded in wider frameworks.
- Empowerment requires a “**champion**” — someone who can maintain energy and visibility after the project's end.

E.2 How to monitor and evaluate the impact of community participation?

Monitoring and evaluating participation was described as both **essential and challenging** by most interviewees. While quantitative metrics (like the number of participants or workshops held) are easy to track, they often fail to capture the **depth and quality of engagement**. Practitioners stressed the need for **mixed methods** — combining qualitative feedback, observational data, and participant follow-ups — to understand how participation has affected individuals and communities.

Common monitoring tools include **attendance records, satisfaction surveys, quote collection, and feedback forms**, but more reflective methods like **semi-structured interviews, focus groups, and ethnographic observation** were considered more effective in assessing long-term impact. One facilitator emphasized the importance of **tracking who continues to stay involved** after the formal engagement ends — such as returning volunteers, co-creators of future initiatives, or community members who become peer facilitators.

Some interviewees used **creative outputs** — like drawings, digital storytelling, or visitor notebooks — as both interpretive and evaluative tools. Others monitored impact by observing **behavioural shifts**, such as increased local use of a heritage site or a new sense of ownership.



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Ultimately, effective assessment requires clarity about **what success looks like**, and alignment between intended outcomes, participant expectations, and the realities of community dynamics.

Key Findings:

- Combine **quantitative and qualitative methods**: numbers alone don't reflect impact.
- Use tools such as **feedback forms, interviews, quotes, and observations** to assess engagement depth.
- **Track long-term involvement** — e.g., return participation, leadership roles, or continued collaboration.
- **Monitor community behavior changes**, like new usage patterns or project uptake.
- Creative tools (e.g., drawings, storytelling, journals) can double as evaluation data.
- Define **impact indicators early** and revisit them throughout the process.
- The quality of engagement is often more telling than quantity — **"who speaks" matters more than "how many."**

E.3 The Arnstein's Ladder of Participation categorises different levels of citizen involvement in decision-making processes. In your vision, and based on your experience, which level(s) of involvement participation are achievable in practice?

Interviewees offered a realistic — and often critical — view of what levels of participation are genuinely achievable in heritage projects. Most agreed that while **higher rungs of Arnstein's Ladder** (e.g., *partnership, delegated power, citizen control*) represent ideal outcomes, these are **rarely achieved in full** due to structural limitations, institutional hesitancy, or political constraints. In practice, most projects hover between **consultation** and **placation**, with occasional steps toward **partnership** — particularly in smaller-scale or community-initiated initiatives.

Several practitioners noted that **true co-creation** is possible but requires **a high level of institutional commitment, time, and flexibility** — and a willingness to share control. Smaller organizations or museums with deep local roots were seen as better able to support shared decision-making, while large institutions often struggled with



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bureaucratic barriers. A few facilitators reported reaching “partnership” when communities were actively involved in shaping both process and outputs, but acknowledged that this often required **external funding, strong local champions, and pre-existing trust**.

Many respondents emphasized the **fluidity of participation** — processes may move up and down the ladder at different phases. One facilitator noted that even if final decision-making remains with professionals, **genuine power-sharing can occur during agenda-setting, storytelling, or framing of interpretive narratives**. Others pointed out that achieving even **tokenistic participation** in certain contexts (e.g., where engagement has historically been absent or communities are disempowered) can be a **significant first step**.

Key Findings:

- Most projects realistically operate between **consultation and partnership** levels.
- **Citizen control and delegated power** are rare and require sustained institutional will, funding, and capacity.
- **Co-creation is possible**, especially in smaller, locally driven initiatives or well-funded EU projects.
- Participation levels can **shift across project phases** — higher in agenda-setting or storytelling, lower in final decisions.
- **Context matters**: political culture, institutional openness, and community history shape what's achievable.
- Even **low-level engagement** can be meaningful if it builds trust and leads to deeper participation over time.
- **Setting realistic participation goals** is key — overselling influence leads to disappointment.
- Use the ladder as a **reflection tool**, not a rigid target.

Section F – Interpretation strategies

This section was aimed at investigating in depth how the experts use technical tools as master plans and interpretive design. Therefore, to answer this section it was



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necessary to have a strong expertise in the field of heritage interpretation rather than heritage management in general. Due to this constraint only some of the experts could answer the following questions.

F.1 When you carry out participatory work on heritage interpretation, do you normally produce a strategic document resulting from the process? E.g. "Interpretation Strategy," "Plan," and "Master Plan"?

- **If so, how is a participatory Interpretation Master Plan designed? What makes it different from a 'traditional' one? Please name, 3 elements that will make the difference**
- **"Interpretation Strategy," "Plan," and "Master Plan": are these terms distinct, or are they used interchangeably? If you think there is a clear distinction, please briefly explain**

This question was answered only by the 12 experts recruited by the training partners.

Across the interviews, most of the selected experts confirmed that they **do produce strategic documents** such as **Interpretation Strategies, Plans, or Master Plans** as a result of participatory processes. However, the way these documents are conceived, named, and used varies significantly depending on the **project scale, institutional culture, and the depth of community involvement**.

Several interviewees emphasized that a **participatory Interpretation Master Plan** is fundamentally different from a traditional one because it is **co-created, process-oriented, and values-driven**. For example, in projects in Norway and the UK, interviewees described how participatory plans involved **iterative workshops, landscape character assessments, and community-led storytelling**, resulting in documents that reflect not just expert input but **locally grounded perspectives**. These plans often go beyond infrastructure or signage—they serve as **living frameworks** for shared heritage understanding.

The distinctions between the terms "Interpretation Strategy," "Plan," and "Master Plan" were acknowledged, though not consistently across contexts. Some, like Kristian Bjørnstad (Norway), see a clear hierarchy: a **Strategy** sets the broader vision, a **Plan** addresses more concrete steps and implementation, while **Master Plan** is either avoided or interpreted as a comprehensive, integrative document covering multiple layers (themes, media, phasing, governance). Others, particularly in the UK, admitted that these terms are often used interchangeably in practice, depending on the client's familiarity and the project brief.

Most notably, a participatory plan differs from a traditional one by emphasizing **joint ownership, emotional resonance, and flexibility**. It avoids rigid top-down prescriptions and instead provides **room for iteration**, ensuring the document becomes a tool communities believe in and use.

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Key Findings:

- Strategic documents are often produced as part of participatory heritage interpretation processes.
- A participatory Interpretation Master Plan differs from traditional plans through:
 - **Co-creation:** Input from diverse stakeholders is integrated throughout, not just consulted at the start.
 - **Emotional and cultural relevance:** Themes, stories, and priorities reflect lived experiences, not just expert logic.
 - **Shared ownership:** The plan is a collaborative product that participants are more likely to support and sustain.
- **Three key elements** that distinguish participatory plans from traditional ones:
 - Joint authorship and stakeholder-driven priorities
 - Flexible and iterative design process
 - Integration of community storytelling and sense-of-place analysis
- **Terminology varies:**
 - Some see clear distinctions:
 - *Strategy* = vision and principles
 - *Plan* = operational steps
 - *Master Plan* = full, layered integration (themes, infrastructure, timeline)
 - Others admit the terms are often used interchangeably, depending on institutional or regional preferences.
- **Challenges** of participatory plans:
 - Risk of being “left in the drawer” if there’s no local champion or follow-up mechanism.
 - Disconnect between participatory process and final media outputs (e.g., signage designed without community oversight).
- **Best practices:**
 - Use participatory planning to balance institutional goals and community insights.
 - Ensure the plan remains usable and adaptable — not overly technical or prescriptive.
 - Maintain community involvement throughout implementation and media production.



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Optional F.2 How do you analyse data collected during participatory activities? How do you incorporate them in the framework of an Interpretation Master Plan?

The two interviewees⁷ emphasized that analyzing data from participatory activities is a **crucial, reflective phase** in the development of a participatory Interpretation Master Plan. The process is typically **qualitative** and **iterative**, involving the collection of narratives, observations, notes, recordings, drawings, and voting outcomes. Rather than applying rigid analytical frameworks, practitioners often use **thematic analysis**, drawing out recurring values, emotions, and concepts expressed by participants. These are then synthesized into **key themes or interpretive messages**, which form the foundation of the master plan.

For example, in one project in Greece, participants shared memories, personal objects, and emotional associations with a historic site. These were recorded, grouped into categories (e.g. “belonging,” “displacement,” “resilience”), and translated into **interpretive themes**, which directly informed spatial storytelling elements in the master plan. Another respondent noted the use of **digital tools and visual mapping** to help make sense of stakeholder input and visualize priorities, which were later integrated into narrative pathways and design recommendations.

The incorporation of data into the master plan is typically achieved through **collaborative interpretation sessions**, where facilitators and designers revisit workshop materials and select content that is both meaningful and practical. Importantly, several emphasized the need to **trace community contributions** clearly in the final document — through quotes, summary tables, or even full transcripts — to **honor transparency and accountability**. This not only strengthens community trust but also reinforces the legitimacy of the interpretive outcomes.

Key Findings:

- **Data from participatory activities is primarily qualitative**, including stories, discussions, objects, maps, and visual materials.
- Practitioners use **thematic analysis** to identify key values and narratives that can guide interpretive messages.
- **Community contributions are grouped into themes** that inform spatial layout, storytelling approaches, and media choices in the master plan.
- **Examples** include the use of voting results to prioritize heritage values, or turning emotional associations into site-wide interpretive themes (e.g., “home,” “loss,” “identity”).
- Some use **digital tools** (e.g., mapping, storyboards) to visualize patterns and decision-making.

⁷ Giktzi and Kanelopoulou



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- The process often involves **joint reflection** between facilitators, designers, and community representatives to ensure authenticity and feasibility.
- Final documents may include **traceable evidence** of community input (e.g., quotes, summaries, images from workshops) to demonstrate accountability.
- The analysis phase is viewed as an extension of participation — not just processing data, but continuing the **dialogue and negotiation of meaning**.



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4. INTERVIEWS OF PROFESSIONALS FROM OTHER SECTORS

Section A - General information

A.6 What is your vision of what “participation” means?

Across the interviews, there is strong agreement that **“participation” is not a fixed or neutral term**, but rather a **context-dependent, political, and deeply relational process**. Most interviewees emphasize that true participation goes far beyond consultation or information-sharing—it involves **empowering communities to co-create agendas, decisions, and actions**. Participation is described as both a **right and a responsibility**, requiring meaningful engagement, not just presence.

Many respondents critique the **overuse or instrumentalization of the term**, particularly in institutional or project-driven settings, where participation is often reduced to ticking boxes or gathering superficial inputs. Instead, they advocate for a vision of participation that is **transformative, inclusive, and iterative**, built on **dialogue, trust, and shared power**. Several highlight that **power asymmetries must be acknowledged and addressed** if participation is to be meaningful.

A number of experts also emphasize the **importance of emotional, cultural, and symbolic dimensions** of participation—not just rational discussion. Participation is seen as a **collective construction** rather than an individual act, and many underline the role of **facilitators as mediators and enablers** rather than controllers of the process. Ultimately, participation is framed as a **process of building relationships, shared meaning, and agency**—often slow, complex, and evolving.

Key findings

- **Participation is contextual and political.** It must be understood within the **cultural, territorial, and institutional setting**, not applied generically. (e.g. Allegrini, Damasco)
- **More than having a voice—it’s about being heard and influencing** True participation involves **agenda-setting, co-decision-making**, and rebalancing power. (e.g. Vraneski, Donati)



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- **Participation should be seen as a process** and an **ongoing relationship**, not a single event or survey. (e.g. Kapetanios, Regnard)
- Many stress that **participation is often nominal or instrumental**, especially when driven by funding requirements. (e.g. Damasco, Giannakidou)
- **Participation should be built on trust and relationships**; long-term engagement, listening, and emotional safety are prerequisites for real involvement. (e.g. Bouchy, Tzirtzilaki)
- **Facilitators are key to meaningful participation**; their role is to **support, not dominate**, and to foster inclusion and empowerment. (e.g., Allegrini, Mpardakis)
- **Participation includes emotional and symbolic dimensions** and it is also about **identity, memory, and affect**, not just logic or policy. (e.g. Tzirtzilaki, Damasco)
- **Collectivity over individuality**; It's not about isolated opinions but about **creating shared spaces for action and understanding**. (e.g. Regnard, Bandiera)
- **Participation is often unequal and asymmetrical**. Attention to **who is included, who speaks, and who decides** is essential. (e.g. Allegrini, Vraneski)

Section B – Participatory methods

B.1 What methodologies do you apply to facilitate participatory activities on heritage meanings and values? Can you provide any methodology specifically tailored for heritage projects? Which is the most effective in encouraging participants/communities to structure and share their perceived values?

The selected experts emphasize that **effective participatory methodologies are context-dependent, flexible, and rooted in relationship-building**. While no single "best" method emerged, a strong preference was expressed for **iterative, dialogue-based approaches** like workshops, storytelling, co-design sessions, and ethnographic engagement. Many experts stress the **importance of pre-engagement or**



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preparatory work, such as **mapping stakeholders, understanding community dynamics, and building trust before implementation**. Participatory theatre, emotional tours, and informal community actions (like collective cleaning or play) also feature as approaches that foster deep engagement. The **phases of participation**—recruitment, implementation, and follow-up—are typically customized, with a strong focus on **continuous reflection, co-ownership, and post-project sustainability**.

Key findings

- **Context is crucial:** Most experts reject “one-size-fits-all” methods and instead tailor their approach to local sociopolitical, cultural, and territorial contexts (e.g. Regnard, Damasco, Allegrini).
- **Storytelling & Personal Narratives:** Several interviewees (e.g. Mpardakis, Kapetanios, Tzirtzilaki) highlight storytelling as a powerful tool to connect emotionally and surface local values.
- **Ethnographic Fieldwork:** Kapetanios describes a method of long-term immersion and participant observation to build trust and surface authentic voices.
- **Forum Theatre & “Theatre of the Oppressed”:** Allegrini describes this method as a way to engage participants in re-enacting and transforming real-life scenarios, encouraging critical reflection and empowerment.
- **Workshops & Focus Groups:** These remain widely used, particularly when structured to ensure inclusivity, manage power dynamics, and incorporate local knowledge (e.g. Vraneski, Bandiera).
- **Iterative Co-Design Processes:** Experts like Donati and Damasco stress ongoing adaptation based on feedback and evolving group dynamics.
- **Preliminary Mapping & Stakeholder Engagement:** Both Regnard and Damasco underscore the importance of early-phase mapping to avoid duplication and uncover hidden tensions or power dynamics.
- **Low-Threshold, Informal Spaces:** Bouchy and Damasco advocate for casual, inclusive spaces (e.g. community meals or playgrounds) to build organic participation.



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- **Follow-Up & Long-Term Sustainability:** Nearly all experts insist that follow-up is essential; lasting change comes from community ownership, shared responsibility, and the creation of “living” spaces or structures.
- **Facilitation as an Art:** Many underline that success depends not just on the method, but on the **skills and sensibilities of the facilitator**, who must be able to listen, adapt, and mediate (e.g. Tzirtzilaki, Allegrini, Regnard).

B.2 There is a wide variety of methods for participatory activities. How do you select the most appropriate in varying contexts?

All the interviewees acknowledge that **selecting the right participatory method is not only a technical choice but a strategic and ethical one**, closely tied to the **specificity of the context**—social, political, cultural, and territorial. Most respondents reject standardized methods, instead favouring approaches grounded in **needs assessment, stakeholder mapping, and local dynamics**. Common selection criteria include the **goals of the process**, the **profile and needs of participants**, **available resources** (time, budget, skills), and **the level of trust or conflict in the community**. Several interviewees add **power analysis and accessibility** as crucial factors, especially when working with marginalized groups. Flexibility, ongoing feedback, and the ability to pivot are also emphasized. Experts with experience in sensitive or high-stakes contexts (e.g., conflict zones, multicultural areas) highlight the need to **prevent harm and avoid raising unrealistic expectations**.

Key findings

- **Understanding the context:** all interviewees emphasize the need for territorial, cultural, and political sensitivity. (e.g. Allegrini, Regnard, Damasco, Donati, Kapetanios)
- **Goals and objectives of the process:** methods for the selection depend on what the participation it is aimed to be achieved—awareness, decision-making, conflict resolution, co-creation, etc. (e.g. Mpardakis, Bandiera, Vraneski)
- **Participant profiles and needs:** consideration of demographics, literacy, vulnerability, interests, and motivations is key. (e.g., Tzirtzilaki, Bouchy, Damasco)



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- **Level of trust and power dynamics:** when communities are fragmented or traumatized, facilitators must choose methods that balance voices and avoid exacerbating inequalities. (e.g. Regnard, Vraneski, Allegrini)
- **Accessibility and inclusiveness:** methods should remove barriers to participation, such as language, location, timing, or format. (e.g. Tzirtzilaki, Damasco, Donati)
- **Available resources:** time, money, and facilitator skills affect what methods are realistic. This is framed as a “realism check” by Mpardakis (but this issue is raised also by Bouchy)
- **Flexibility and adaptability:** facilitators must be able to adjust the method on how participants respond. (e.g. Tzirtzilaki, Donati, Allegrini)
- **Existing community dynamics and practices:** some interviewees stress building on what already exists locally to avoid duplication or imposition. (e.g. Regnard, Damasco)
- **Ethical considerations and risk mitigation:** some stress avoiding harm, tokenism, or manipulation. Participation should never worsen local tensions. (e.g. Regnard, Vraneski)
- **Potential for long-term impact:** choose methods that foster continuity, autonomy, and local ownership beyond the initial engagement. (e.g. Damasco, Allegrini)

B.3 How can contributions from experts and communities be balanced to foster meaningful collaboration and minimise the risk of disappointment?

The majority of interviewees agree that **meaningful collaboration between experts and communities hinges on transparency, early engagement, and co-creation**. Balancing contributions requires acknowledging **asymmetries in power, knowledge, and expectations**. Experts should enter not as authorities but as facilitators or listeners who offer tools and insights to **amplify community voices**, not replace them. A recurring theme is the **need for mutual learning**, where both sides gain from the process. Several interviewees emphasize the **importance of setting clear expectations and boundaries early**, ensuring communities understand what can and cannot be influenced. Examples highlight collaborative design phases, dialogical



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methods like walks and theatre, and responsive adjustments during conflict or disengagement. Ultimately, trust, humility, and shared ownership are the cornerstones of a balanced participatory approach.

Key Findings

- **Start with listening and co-definition:** experts should not arrive with predefined solutions. Early stages must involve **co-identifying needs and goals**. (e.g. Regnard, Bandiera, Damasco)
- **Design for shared ownership:** avoid top-down decision-making by using formats like co-design, exploratory walks, and iterative feedback. (e.g. Allegrini, Vraneski)
- **Clarify roles and expectations upfront:** prevent disappointment by making clear **what is negotiable and what is not**. This builds credibility. (e.g. Donati, Regnard, Bouchy)
- **Use multi-phased approaches:** some processes introduce **staged collaboration**, allowing experts and citizens to contribute at different points with clear purpose. (e.g. Allegrini, Bandiera)
- **Facilitate rather than direct:** experts are most effective when they **act as facilitators, not gatekeepers**, helping communities articulate and refine their visions. (e.g. Mpardakis, Damasco)
- **Leverage informal and creative methods:** approaches like storytelling, theatre, or even sports can **bridge gaps and build trust**. (e.g. Allegrini, Tzirtzilaki, Damasco)
- **Acknowledge and address power asymmetries:** this includes actively involving marginal voices and providing tools for them to express themselves. (e.g. Regnard, Vraneski, TSB)
- **Ensure ongoing dialogue and flexibility:** several interviewees insist on **continuous conversation and adaptation** to avoid disillusionment. (e.g. Vraneski, Donati)
- **Embed experts early, not late:** bringing experts in too late makes them enforcers; early engagement allows for co-creation. (e.g. Allegrini)



- **Institutional learning:** some public institutions need to learn how to **integrate community input genuinely**, moving beyond tokenism. (e.g. Allegrini, Damasco)

B.4 How to deal with “negative” outcomes expressed by involved individuals/stakeholders/communities?

The interviewees take a **nuanced and constructive view of “negative” outcomes**, generally reframing them not as failures, but as **integral parts of authentic participatory processes**. Across sectors—urban planning, education, archaeology, the arts, and community development—there is a shared recognition that disagreement, resistance, disappointment, or disengagement often reveal **underlying tensions, unmet expectations, or structural issues** that need to be addressed, not avoided.

Rather than suppressing or bypassing negativity, many experts emphasize **creating space for its expression**, treating it as a signal that something important is surfacing. This involves adopting an **open, reflective posture** and a willingness to **reframe conflict or frustration as a resource for learning or reorientation**. Some stress the importance of **setting boundaries and establishing rules** at the outset, so that when tensions arise, there’s a shared reference point for resolution. Others advocate for **empathic facilitation**, helping participants verbalize their discontent and reclaim agency in the process. Several respondents argue that **conflict or dissatisfaction often stems from poor initial engagement, unmet expectations, or insufficient clarity about the scope of participation**, which highlights the need for better preparation and communication.

A few particularly innovative strategies include using **artistic techniques**, like collage workshops, or redirecting frustration through **constructive, self-reflective dialogue**. Others point to the importance of **long-term re-engagement**, recognizing that some stakeholders might step away and return later when trust is restored. In all cases, facilitators are urged to remain flexible, non-defensive, and oriented toward **repair, re-engagement, and learning**, even in the face of criticism.

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Key findings

- **Reframe negativity as part of the process:** many view dissatisfaction or criticism as a **natural phase** of group dynamics and evidence of genuine engagement. (e.g. Allegrini, Damasco, Regnard)
- **Facilitate open dialogue, don't suppress critique:** when stakeholders feel frustrated, they must be **given the space to express it**, often revealing deeper structural or emotional tensions. (e.g. Vraneski, Donati)
- **Use disappointment as a diagnostic tool:** negative outcomes can signal issues with **expectation-setting, facilitation, or lack of co-ownership**. These should be used as feedback to adjust the process. (e.g. Tzirtzilaki, Bandiera)
- **Build in flexibility to adapt or reorient:** processes should be agile enough to **change course if needed**, especially when the group's energy drops or conflicts intensify. (e.g. Regnard, Bouchy)
- **Don't pathologize conflict:** Damasco and others argue that **conflict is productive**, not something to be "fixed" but embraced and worked through. It's a sign that power is being negotiated.
- **Guide with questions, not solutions:** when facing resistance, facilitators can help participants reflect and **regain agency** by asking clarifying questions instead of imposing fixes. (e.g. Tzirtzilaki's collage example)
- **Have clear rules, but be willing to evolve them:** conflict can be managed if **ground rules are established early**, but facilitators must also allow for adjustment when rules no longer serve the group. (e.g. Allegrini, Damasco)
- **Take the long view – relationships over time:** some tensions don't resolve immediately; **leave doors open for participants to return later**. (e.g. Damasco, Regnard)
- **Support self-organization as a response to frustration:** in some cases, discontent led participants to take **ownership and form independent groups**, which improved long-term sustainability. (e.g. Allegrini)



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- **Acknowledge institutional limitations:** disappointment often arises when **community aspirations exceed what institutions are willing to support**. Being honest about this early helps prevent backlash. (e.g. Bouchy, Regnard)
- **Use artistic and embodied techniques:** participatory theatre, collage, and storytelling can help participants **channel frustration into expression** and transformation. (e.g. Tzirtzilaki, Allegrini)

B.5 Optional. Can you think of any methodology specifically applicable to the heritage sector?

The interviewees⁸ provided thoughtful, experience-based insights into methodologies specifically applicable to the **heritage interpretation sector**. Each emphasized that **heritage cannot be addressed with rigid, predefined formats**, and instead called for **immersive, emotionally resonant, and context-sensitive approaches**.

Allegrini advocated for a structured, multi-phased facilitation process that includes **visioning, co-design, and participatory storytelling**, deeply rooted in local experience and collective meaning-making. Damasco stressed the need for **organic community activation**, starting from small, meaningful actions in physical spaces—an approach that treats heritage as **living and functional** rather than static. Tzirtzilaki directly linked the idea of the “**Time Machine**” to **memory-based and narrative-driven participation**, using emotional tours and personal storytelling to connect participants to heritage through affective experience.

Despite their different formats, all three agree on the **importance of grounding heritage participation in lived experience, co-creation, and emotional engagement**, making the community not just a recipient but an active interpreter and steward of heritage.

Key findings:

- **Heritage as “living practice”:** Damasco redefines participation as **place reactivation** through small actions rooted in everyday needs (e.g., transforming neglected gardens). It’s not about preservation alone, but **renewed community use**.

⁸ This optional question was answered by Allegrini, Damasco, Tzirtzilaki



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- **Multi-phased, vision-oriented processes:** Allegrini outlines a **step-by-step method**: mapping, visioning, co-design, decision-making, and sustaining through community governance. Heritage is interpreted **through collective storytelling, emotional mapping, and participatory walking tours**.
- **Emotional and narrative immersion:** Tzirtzilaki promotes “**emotional tours**” and story-based methods to help participants connect to the affective layers of heritage, aligning with the “**Time Machine**” metaphor—where past, memory, and personal experience converge.
- **Storytelling as a tool for inclusion and reflection:** all three agree on the **power of storytelling**, whether through theatre, memory walks, or informal dialogue, to surface diverse interpretations of heritage.
- **Co-creation over consultation:** heritage methodologies must move beyond token consultation; they require **community-led reinterpretation and shared authorship**.
- **Flexible and responsive engagement:** these methods emphasize **adaptability** over technical rigidity—embracing improvisation, responsiveness to local dynamics, and a bottom-up structure.
- **Spatial Anchoring:** Especially in Damasco’s and Allegrini’s approaches, the **physical and symbolic role of place** is central. The space itself becomes a medium for participation and heritage co-interpretation.

Section C – Facilitators’ profile

C.1 Based on your experience, what are the most suitable professional backgrounds of facilitators involved in participatory processes?

The interviewees consistently agree that **facilitators in participatory processes must possess interdisciplinary expertise**, with their effectiveness depending less on a specific profession and more on a **blend of personal attributes, practical skills, and contextual understanding**. However, several sectors emerged as especially well-suited for facilitation roles due to their grounding in **community dynamics**,



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communication, and empathy—notably **social sciences, education, the arts, urban planning, and anthropology**.

Some, like **Damasco** and **Allegrini**, emphasize that facilitators must go beyond their formal training and demonstrate **hands-on experience, adaptability, and an ability to manage group dynamics and conflict**. Others, like **Vraneski** and **Regnard**, highlight the added value of facilitators having **domain-specific knowledge** (e.g., heritage, planning, or ecology), especially in technical or high-stakes discussions. A few, including **Bouchy**, point to the utility of being **external to the local context**, offering neutrality and fresh perspectives, while others argue for a **hybrid model** where local knowledge and external detachment are combined.

Ultimately, the consensus is that the “ideal” facilitator is not defined by one background but by their **capacity to navigate complexity, listen actively, foster trust, and adapt their tools and style to the needs of diverse groups**.

Key findings

- **Social sciences (sociology, anthropology, psychology)** – strongly recommended for their training in **group behavior, culture, and power dynamics**. (e.g. Allegrini, Kapetanios, Tzirtzilaki)
- **Education and pedagogy** – Valued for fostering **inclusive dialogue, empathy, and structured group engagement**. (e.g. Donati, Bandiera)
- **Urban Planning and Architecture** – Particularly in heritage or place-based projects, urbanists bring spatial awareness and systemic thinking. (e.g. Vraneski, Damasco)
- **Artists and creative practitioners** – Frequently praised for their capacity to **break down barriers, use emotion, and create accessible, engaging formats**. (e.g. Allegrini, Tzirtzilaki, Damasco)
- **Community development and local activism** – Praised for deep **local knowledge, trust-building, and practical facilitation** of grassroots processes. (e.g., Regnard, Bouchy)



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- **Environmental and heritage specialists** – Recommended when the participatory process is closely tied to technical content, as they bring credibility and context-specific knowledge. (e.g. Kapetanios, Vraneski)
- **Professional facilitators (with training)** – Recognized as important, especially when stakes are high or contexts are conflictual. However, facilitation is often practiced by **non-certified but experienced individuals**. (e.g. Allegrini, Regnard)
- **Interdisciplinary and hybrid profiles** – Many emphasize that the most effective facilitators often **cross professional boundaries**, drawing on skills from multiple domains. (e.g. Allegrini, Damasco, Vraneski)

C.2 What specific soft and professional skills are required of facilitators and how are these skills cultivated in your field?

The interviewees converge on the idea that **facilitators must embody a combination of emotional intelligence, practical experience, and theoretical understanding**, making them capable of adapting to unpredictable, often sensitive group dynamics. While technical or sector-specific knowledge is sometimes important, what defines a great facilitator is not what they know, but **how they listen, connect, adapt, and guide**.

Soft skills like **active listening, empathy, conflict management, emotional resilience, and neutrality** are considered essential across all contexts. These are often **not formally taught but developed through experience, reflective practice, community work, or the arts**. On the professional side, skills such as **group process design, participatory methodology, conflict mediation, and clear communication** are critical—especially in settings involving divergent interests or high emotional stakes.

A recurring point is that facilitators must be **comfortable with uncertainty and complexity**, able to manage both highly structured processes and more fluid, evolving community dynamics. Several interviewees also emphasize **embodied or artistic forms of facilitation**, where presence, rhythm, voice, and non-verbal communication play a large role.



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Key findings

- **Active listening:** mentioned by almost every interviewee. It's the foundation of trust-building and the key to understanding both spoken and unspoken group dynamics. (e.g. Bouchy, Allegrini, Regnard)
- **Empathy and emotional intelligence:** crucial for navigating tension, building connection, and helping participants feel seen and heard. (e.g. Damasco, Tzirtzilaki, Bandiera). Damasco also suggest that **sometimes rationality can be more effective than empathy** to solve practical issues.
- **Conflict management:** facilitators must stay calm, mediate disagreements, and channel conflict constructively. Cultivated through on-the-ground experience. (e.g. Allegrini, Damasco, Regnard)
- **Adaptability and improvisation:** the ability to change course when things don't go as planned. Especially key in artistic and community-led contexts. (e.g. Tzirtzilaki, Vraneski)
- **Clarity and communication skills:** facilitators must be clear in speech and intention, while still leaving room for open dialogue. (e.g. Vraneski, Donati)
- **Neutrality and fairness:** not to be confused with indifference—being equi-proximate (equally close to all sides) helps manage power imbalances. (e.g. Allegrini, Regnard)
- **Group dynamics awareness:** knowing when to step in, step back, and how to manage group energy or tension over time. (e.g. Bandiera, Kapetanios)
- **Creativity and embodied facilitation:** artistic skills like performance, rhythm, and storytelling help engage emotions and create inclusive space. (e.g. Damasco, Tzirtzilaki)
- **Experience in the field:** many say the best learning comes through doing—working in communities, reflecting on mistakes, and learning from mentors or peers. (e.g. Regnard, Damasco, Allegrini)



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C.3 Should the facilitator be a person belonging to the local context, or is it better to involve an external figure with a more detached perspective? Is it advisable to involve professional facilitators, and if so, in which circumstances?

Most interviewees agree that **there is no one-size-fits-all answer**, and the choice between a local or external facilitator should be guided by the **nature of the context, the sensitivity of the subject, and the structure of the community involved**. A key insight shared across responses is that both internal and external facilitators bring unique strengths and limitations: **locals offer deep knowledge, cultural fluency, and built-in trust**, but may also be entangled in existing power dynamics or perceived biases. Conversely, **external facilitators bring neutrality, distance from local conflicts, and a fresh perspective**, but often require time to build credibility and cultural understanding.

Some experts, like Damasco and Allegrini, strongly advocate for **hybrid models**, where **a local and external facilitator work in tandem**, combining proximity with neutrality—described as a “tear and stitch” dynamic that helps balance inclusion with objectivity. This is especially important in **conflictual or power-imbalanced contexts**, where a purely local figure may be viewed as partial. Others, like Regnard and Bouchy, note that **external facilitators can provoke less resistance and operate with more freedom**, especially when navigating politically sensitive topics. However, most agree that **professional facilitators are essential when stakes are high**, or when processes involve cross-sector dialogue, complex power relations, or the need for structured, transparent engagement.

Key findings

- **Local facilitators offer legitimacy and trust.** They know the community, culture, and informal dynamics well—but may carry perceived bias or historical baggage. (e.g. Damasco, Allegrini)
- **External facilitators bring neutrality and perspective.** They are often better at navigating entrenched tensions and can offer a “mirror” to the community. (e.g. Regnard, Bouchy)
- **Hybrid facilitation models are ideal:** pairing an internal and external facilitator balances embedded knowledge with detachment, allowing for flexibility and responsiveness. (e.g. Damasco)



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- **Professional facilitators are crucial in high-stakes or conflictual settings:** their experience, structure, and impartiality help ensure transparency and inclusive dialogue. (e.g. Allegrini, Vraneski)
- **Context determines the best choice:** in activist or deeply localized work, internal facilitation may be better; in policy consultation or sensitive negotiations, external or trained professional facilitators are often preferred. (e.g. Regnard)
- **Building trust takes time regardless of origin:** external facilitators must listen deeply and co-build legitimacy; local facilitators must navigate their dual role carefully. (e.g. Allegrini, Regnard)

Section D – Participants’ management

D.1 What methods can be used to invite and select participants? How does the recruitment process influence the quality (positively or negatively) of engagement and the composition of the group?

Across the interviews, facilitators consistently emphasized that the **way participants are invited and selected has a direct and powerful impact on the quality of engagement**, the group’s representativeness, and the legitimacy of the process itself. A key shared insight is that **conventional outreach methods—like public posters or official emails—often fall short**, especially when trying to engage marginalized, disinterested, or less organized communities. Instead, effective facilitators use a mix of **personalized, trust-based, and context-aware strategies** that prioritize relationship-building over mass outreach.

Several interviewees advocate for **working through local intermediaries**, such as community leaders, schools, associations, or social workers, who already have the trust of specific groups. Others highlight **face-to-face engagement, informal conversations, and visible community presence** as essential for reaching less vocal or less “invited” participants. The recruitment process, they argue, is not neutral—it can **shape group dynamics**, reinforce or disrupt power imbalances, and either **encourage diversity or perpetuate exclusion**.



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Importantly, many interviewees caution against simply filling a room with “whoever shows up” or relying solely on self-selection. Instead, **purposeful selection—balanced with openness—is key**, ensuring that a diversity of voices is brought in without overwhelming or diluting the process. Ultimately, recruitment is seen not as a logistical task but as the **first act of facilitation**, setting the tone for how inclusive, empowering, and meaningful the process will be.

Key findings

- **Leverage trusted intermediaries** – contacting participants via **heads of local networks, teachers, social workers, or local associations** increases credibility and relevance. (e.g. Bouchy, Regnard, Damasco)
- **Face-to-face and personal invitations are most effective** – Especially in communities with low trust or where previous outreach failed (e.g., posters not working), **direct personal contact** is crucial. (e.g. Tzirtzilaki’s emotional tour project)
- **Representation must be curated** – While openness is important, **purposeful balance of gender, age, geography, and social background** improves dialogue. (e.g. Regnard’s stakeholder mapping and cross-checking)
- **Low-threshold, informal invitations increase inclusion** – Creating **accessible, non-intimidating spaces and outreach methods** ensures marginalized voices are more likely to join. (e.g. Damasco)
- **Selection is political, not neutral** – Who is invited reflects **assumptions about who “counts”** in the community—this must be consciously questioned. (e.g. Allegrini, Damasco)
- **Self-selection alone can skew representation** – If only the most engaged or powerful groups respond, the participatory space risks becoming **unbalanced or performative**. (e.g. Donati, Vraneski)
- **Mix formal with informal approaches** – Combining structured invitations (e.g. official letters, open calls) with informal recruitment (e.g. word-of-mouth, community liaisons) increases reach. (e.g. Bandiera)



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- **The recruitment process sets the tone.** It signals to participants **what kind of process this will be**: top-down vs. collaborative, exclusive vs. inclusive. (e.g. Allegrini, Regnard)
- **Inclusive selection enhances group dynamics and outcome.** When a group feels balanced and diverse, it's more likely to **collaborate meaningfully and stay engaged long-term**. (e.g. Tzirtzilaki, Kapetanios)

D.2 Should individuals with little or no interest in community life be engaged in these activities? If so, what strategies can facilitate their meaningful involvement?

Most interviewees agree that while not **every individual must be engaged**, it is **crucial to create pathways for those who are typically disengaged or excluded to participate meaningfully**—especially when their voices are rarely heard in public processes. However, rather than forcing participation, the emphasis is placed on **understanding why some individuals are disconnected**—whether due to social marginalization, past disappointments, language barriers, or simply different priorities—and **adapting strategies to meet them where they are**.

Engagement of the “uninterested” is seen as not only possible but also **desirable for authentic inclusivity**, provided that facilitators invest in **relationship-building, informal invitations, and low-barrier, interest-based engagement methods**. A recurring idea is that **participation must feel relevant and emotionally resonant**—when people see a concrete connection to their daily life, they are more likely to take part.

Examples include organizing informal activities like **sports, community cleaning, shared meals, or artistic actions** that do not initially appear “political” or “participatory,” but create entry points for trust and ownership. Interviewees warn against patronizing strategies or box-ticking outreach, advocating instead for **gentle, organic methods that respect people’s time, dignity, and different forms of expression**.



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Key findings

- **Engagement should not be forced, but facilitate.** Not everyone is ready or willing to participate at all times. Participation must be **invited, not imposed**. (e.g. Damasco, Allegrini)
- **Use informal and non-threatening entry point.** Recreational or creative activities—like **soccer games, street performances, or food events**—can draw people in without intimidating them. (e.g. Damasco’s football league with migrant youth)
- **Participation must feel personally and socially relevant.** People engage when they **see value or emotional resonance** in the process. It has to speak to their lived reality. (e.g. Allegrini, Tzirtzilaki)
- **Trust-building is key.** For many disconnected individuals, the barrier is not apathy but **a lack of trust or past bad experiences**. (e.g. Regnard, Bouchy)
- **Start with listening, not telling.** Creating a safe space where people are heard—even casually—can spark interest over time. (e.g. Kapetanios)
- **Offer roles that empower.** Invite people to contribute **in ways that align with their skills or comfort zone**, even if it's behind-the-scenes or non-verbal. (e.g. artistic or embodied communication—Damasco)
- **Ritual and continuity help build participation habits** Regular meetings or events, even if small, help people slowly integrate into community life. (e.g. Damasco’s idea of participation as “ritualized practice”)
- **Avoid one-size-fits-all expectations.** Participation should be flexible—some may want to observe, others to lead. Value every form of involvement. (e.g. Allegrini, Bandiera)
- **Recognize that “disinterest” is often a systemic outcome.** Social and institutional exclusion often leads people to withdraw from public life—**not the other way around**. (e.g. Damasco)



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D.3 How can we balance diversity and representation in a working group with a manageable size? Is it preferable to involve a large, diverse group or a smaller, more focused set of participants?

Interviewees consistently affirm that **diversity and representation are essential for legitimacy and inclusivity**, but must be balanced with **practicality and meaningful participation**. The size of a group matters less than the **design of the space and the dynamics it fosters**. Large groups may bring visibility and a sense of inclusiveness but often lack depth and dialogue. Smaller groups enable **trust, intimacy, and richer conversation**, yet risk becoming echo chambers or unrepresentative if not thoughtfully composed.

The consensus is that **representation doesn't mean inviting everyone—it means ensuring that different voices, experiences, and power positions are present and heard**. This requires **conscious selection**, grounded in **stakeholder mapping, understanding local dynamics, and reducing barriers to entry**. Several experts emphasize **rotating or layered participation structures** (e.g., small working groups feeding into larger assemblies), allowing for both focus and inclusion. Others advocate for **designing low-threshold spaces** where diversity arises naturally, instead of enforcing it mechanically.

In short, the aim is not to choose between large or small groups, but to **design participatory processes that allow diverse representation to be meaningful, not symbolic**—through structure, facilitation, and flexibility.

- **Diversity improves quality and legitimacy of outcomes.** Broad representation — in terms of geography, gender, sector, and expertise — leads to more inclusive, creative, and credible results.
- **Smaller groups are more efficient and cohesive.** Compact teams (typically 6–12 members) tend to reach decisions faster, communicate more effectively, and stay more focused on goals.
- **There's a trade-off between inclusivity and manageability.** Larger groups allow for broader stakeholder input but can struggle with coordination, diluted accountability, and decision paralysis.



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- **A tiered or phased approach can offer the best of both.** Many successful working groups use a **core team** (small, focused, diverse) supported by **broader advisory or consultation circles** to gather input without sacrificing agility.
- **Clarity of purpose helps determine ideal size and composition.** When the task is exploratory or values-driven, diversity becomes more critical. When the task is technical or time-sensitive, efficiency may take precedence.
- **Process design matters as much as composition.** Even a highly diverse group can function well if there are strong facilitation methods, clear roles, and mechanisms for structured input and decision-making.
- **Rotating or time-bound participation can increase diversity over time.** Instead of having all voices at the table simultaneously, strategic rotation allows more stakeholders to contribute meaningfully across the life of the group.

D.5 Optional. What strategies can be employed to identify and manage conflicts among stakeholders during participatory activities?

Both Allegrini and Damasco⁹ provide rich, experience-based insights on managing conflict within participatory processes. They agree that **conflict is not inherently negative**, but rather a **natural and often necessary component** of meaningful participation. If acknowledged and handled well, conflict can lead to **clarity, deeper understanding, and stronger collective ownership**.

Allegrini emphasizes **proactive conflict management**, suggesting that facilitators should engage in early **power and stakeholder mapping** to identify potential tensions before they escalate. She also advocates for the creation of **shared “meta-rules”**—a collaboratively developed code of conduct—which help guide how participants relate to each other and resolve issues as they arise. Flexibility is key: rules should evolve with the process, not constrain it.

Damasco complements this with a practical, grounded perspective. He emphasizes that **conflict should not be avoided, but embraced** as a driver of transformation. Instead of aiming for artificial harmony, facilitators should **allow conflict to surface**

⁹ This optional question was answered only by Allegrini and Damasco

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and unfold, provided there are clear, collectively agreed boundaries. He proposes that conflict be approached through **continuous dialogue, time, and relational trust**—understanding that some tensions may never fully resolve, but can be navigated with care.

Both experts highlight that successful conflict management is **less about resolving disputes on the spot and more about creating structures and cultures** in which disagreement is welcomed, voiced, and constructively engaged.

Key findings

- Start with conflict and power mapping**
 Identify visible and invisible tensions early through **stakeholder analysis and relational mapping**. (Allegrini)
- Develop shared rules of engagement**
 Co-create “meta-rules” or ground rules that participants agree to follow, which set **clear expectations for respectful dialogue**. (Allegrini)
- Acknowledge conflict as normal and useful**
 Normalize disagreement as part of group evolution—not as a failure. (Damasco)
- Give conflict time and space**
 Avoid rushing to resolve tensions. Instead, allow time for issues to unfold and evolve. (Damasco)
- Manage roles and positionality**
 Understand **who benefits from conflict**, who avoids it, and who is most vulnerable within it. (Allegrini)
- Create formal structures for dialogue**
 Use structured negotiation tables or safe spaces for mediated discussion, especially when conflicts are embedded or historic. (Allegrini)
- Maintain flexibility in rules and process**
 Be open to **revisiting and adapting group agreements** as needs shift and dynamics change. (Allegrini)



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- **Use conflict as a transformative opportunity**
Rather than suppressing tension, see it as a way to **reveal hidden concerns, re-balance power, and deepen participation**. (Damasco)
- **Prioritize relationship-building**
Conflict is easier to navigate when relationships are strong. Invest in **trust and informal dialogue** throughout the process. (Damasco)

Section E – Outcomes and follow ups

E.1 (If applicable) Based on your experience, how can we keep communities engaged in the long term even after the end of the participatory activities? Beyond seeking feedback or approval, are there other strategies that enhance commitment in the long term?

Sustaining community engagement beyond the formal end of participatory activities is widely recognized by the interviewees¹⁰ as a **crucial yet challenging goal**. Those who addressed the question emphasize that long-term involvement is most likely when communities **feel ownership, relevance, and autonomy** in the outcomes and the process itself. Engagement must move from “participation in a project” to **a sense of co-responsibility in an ongoing, living initiative**.

Three core strategies emerged: First, the need to **build community infrastructure**—such as working groups, local committees, or associations—that persists beyond the life of a single project. Second, participation should be **embedded in everyday routines and functions**, not treated as a special or occasional event. This ritualization helps normalize continued involvement. Third, facilitators must **step back strategically**, allowing communities to self-organize while still offering **light support structures** or points of re-engagement.

Real-life examples reinforce these principles: from community evaluation teams transforming into independent associations (Allegrini), to neighborhood gardens becoming self-managed hubs (Damasco), to local committees acting as community custodians (Regnard). Ultimately, long-term commitment is fostered not by one-time

¹⁰ This question was answered by Allegrini, Damasco and Regnard



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feedback loops, but by **continuous, flexible, and self-directed forms of community governance**.

Key findings

- Transform “group work” into “working groups”**
 When participants **take shared responsibility**, with distributed roles and ownership, engagement continues organically. (e.g. Allegrini’s participatory group forming an association)
- Embed participation in daily life and functions**
 Engagement is more sustainable when linked to **everyday activities**, like childcare, shared meals, or space management. (e.g. Damasco’s example of reclaiming a public garden)
- Support self-organizing structures**
 Creating or enabling **local committees, councils, or associations** gives communities an ongoing platform for action. (e.g. Regnard’s empowerment-based committee model)
- Maintain light-touch institutional support**
 Even after stepping back, institutions or facilitators should **stay within reach**, offering advice or occasional support. (e.g. Damasco’s relational approach to presence)
- Work with champions and community leaders**
 Identifying individuals who are **personally invested and widely trusted** ensures continuity and community momentum. (e.g. Regnard’s focus on “natural champions”)
- Build shared identity and belonging**
 Engagement lasts when participants **feel the project reflects their values and aspirations**, not just institutional goals. (e.g. Allegrini, Damasco)
- Create recurring rituals and rhythms**
 Weekly or monthly meetings, open spaces, or events can **anchor participation over time**. (e.g. Damasco’s idea of participation as a weekly ritual)



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- **Be flexible and responsive to evolving needs**

Communities are dynamic—structures must **adapt as people and priorities change**. (e.g. all three interviewees emphasize adaptability)

E.2 How to monitor and evaluate the impact of the participatory approach?

While evaluation is often treated as a procedural step at the end of a project, interviewees emphasize that **monitoring and evaluation should be embedded throughout the participatory process**, not added as an afterthought. Many note that standard evaluation tools—like post-event surveys or quantitative indicators—are often insufficient to capture the **depth, complexity, and relational outcomes** of participatory work. Instead, they advocate for **creative, participatory, and iterative methods** that involve both community members and facilitators in reflecting on progress, relevance, and outcomes.

Some propose **co-designed evaluation frameworks**, where indicators are developed with participants at the beginning of the process. Others use **qualitative tools** like storytelling, focus groups, reflective journals, and even digital platforms to track evolving relationships and impact over time. A few, like Damasco, present **innovative systems**, such as a relational database ("Portale dei Saperi") that maps community knowledge and tracks collaboration outcomes beyond the lifespan of individual projects. Across the board, the interviewees agree that evaluation must be more than accountability—it must serve as **a collective learning process** that feeds back into the participatory journey.

Key findings

- **Evaluation should be participatory itself**

Involving participants in defining what “success” looks like makes evaluation **more meaningful and empowering**. (e.g. Allegrini, Bandiera)

- **Define shared indicators from the start**

Co-create evaluation criteria with communities early on—don’t impose them post hoc. (e.g. Allegrini’s collaborative observation grids)

- **Use qualitative and narrative tools**

Focus groups, personal stories, and reflective discussions help surface **emotional, cultural, and relational impacts**. (e.g. Regnard, Tzirtzilaki)

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- **Track Long-Term Effects, Not Just Immediate Outcomes**
Many impacts (e.g. trust, empowerment, network-building) **take time and don't appear immediately**.
(e.g. Damasco's "Portale dei Saperi" platform)
- **Documentation is key in weak governance contexts**
Written records increase transparency and **help sustain results after facilitators leave**. (e.g. Regnard)
- **Celebrate small, visible results**
Early, tangible outcomes (even symbolic ones) can **reinforce commitment and energy**. (e.g. Bouchy)
- **Evaluation as ongoing reflection**
Treat evaluation as a **dialogue, not a verdict**—a way to continually realign goals and check relevance. (e.g. Vraneski)
- **Use technology thoughtfully**
Tools like digital mapping, media storytelling, or relational databases **extend evaluation beyond the workshop**. (e.g. Damasco's AI-assisted database of 3,000+ profiles)

E.2 How to monitor and evaluate the impact of the participatory approach?

Interviewees show a sophisticated and critical understanding of Arnstein's Ladder, generally agreeing that while higher levels of participation—such as partnership, delegated power, and citizen control—are the most desirable, they are also the most difficult to achieve and sustain. Several stress that in real-world contexts, participatory processes often operate in a hybrid zone between consultation, placation, and partnership, depending on political will, institutional culture, community readiness, and resources.

Some experts, like Damasco, argue that the ladder model oversimplifies the nonlinear, relational, and ritualized nature of participation, suggesting that the goal is not always to "climb" but to sustain meaningful engagement at the level that fits the context. Others, like Allegrini and Regnard, call for critical use of the ladder, noting that even at high levels, participation can be tokenistic if not grounded in shared ownership and mutual accountability.



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Despite different views, there is consensus that genuine partnership is both the most realistic and most impactful level in many projects—when citizens and institutions co-design and co-decide on actions. Delegated power is achievable, but often limited to specific cases (e.g. participatory budgeting or local committees). Full citizen control is rare and typically dependent on long-term capacity-building and supportive policy environments.

Key findings

- **“Partnership” is the most achievable and impactful level**
Many cite this level as where **genuine collaboration between institutions and communities happens**, particularly in co-design and co-management settings. (e.g. Allegrini, Regnard)
- **“Delegated power” is possible in structured, time-limited formats**
Examples include **participatory budgeting or community councils**, where decision-making is temporarily handed to citizens. (e.g. Damasco, Bandiera)
- **Full “citizen control” is rare and often unsustainable**
Achievable only when there is strong local organization, trust, and **policy infrastructure that supports autonomy**. (e.g. Allegrini)
- **Many processes hover between “consultation” and “placation”**
Without political backing or institutional change, participation often remains symbolic or reactive. (e.g. Vraneski, Donati)
- **Participation as ritual and continuity, not just power transfer**
Damasco proposes a model where **recurring community meetings and shared rituals** matter more than climbing a ladder. (e.g. “participation as a Monday at 6 p.m.”)
- **Institutional learning is needed to support higher levels**
Several note that public bodies must **adapt their culture** to allow deeper levels of citizen involvement. (e.g. Allegrini, Bouchy)
- **Even “lower” rungs can be valuable if done meaningfully**
Honest consultation with real feedback loops is **better than pseudo-partnership with no actual agency**. (e.g. Regnard)



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- **Climbing the ladder requires long-term trust-building and investment**
Deep participation doesn't happen quickly—it's a **slow process of capacity-building, confidence, and structural support.** (e.g. Regnard)



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5. TOWARDS THE EMPATHS COMPENDIUM: CONSIDERATIONS AND SUGGESTIONS

The final goal of this research is to support the development of the EMPATHS Compendium with insights that can be transformed into accessible, usable guidance for professionals working on participatory interpretation plans and heritage meaning-making in general.

Structured as both a **training material and a reference guide**, the Compendium should offer:

- Conceptual grounding in participatory heritage interpretation
- A practical, adaptable methodology aligned with real-world complexity
- Tools, templates, case studies, and cautionary tales drawn from practice

This resource should support professionals and institutions seeking to move beyond participation as a formal requirement, towards participation as a transformative, co-creative practice rooted in respect, dialogue, and shared meaning-making.

5.1 General advice from within and without the heritage sector

The interviews conducted for this research have offered useful insights into the development of effective participatory HI methodologies. A consistent theme across both heritage and participation experts was the rejection of rigid, prescriptive frameworks in favor of **customisable, flexible, modular approaches**. Rather than applying a fixed sequence of steps, successful participation strategies must be **adapted to context**, shaped by the social, political, emotional, and cultural dynamics of each specific case.

The findings show a **convergence between heritage professionals and experts from other sectors regarding the nature, challenges, and opportunities of participatory approaches**. Both groups view participation as an ongoing, dynamic, and relationship-based process rather than a one-off consultation. They agree on the importance of flexibility, context sensitivity, and early engagement with communities. While heritage professionals tend to emphasize storytelling, emotional connection, and the blending of expert and community narratives within structured interpretation frameworks, professionals from other sectors bring a more explicitly political and relational lens, viewing participation as a transformative act tied to power dynamics, identity, and collective agency. Methodologically, both types of experts use similar participatory tools — e.g. workshops, storytelling, co-design — but professionals from other sectors often frame these tools within a broader sociopolitical context, stressing trust-building, accessibility, and the symbolic/emotional weight of participation. The role of facilitators is central in both domains, though the professionals from other sectors place even greater emphasis on facilitators as mediators of power, emotion, and meaning-making.



Theme	Similarities	Differences
Understanding of Participation	Seen as dynamic, inclusive, co-creative, and more than consultation	Heritage professionals link participation closely to heritage meaning-making; other sectors see it as a political and relational act
Approach to Methods	Reject one-size-fits-all; emphasize contextual and emotional adaptability	Heritage sector often integrates interpretive planning; other sectors focus more on informal, symbolic, and relational formats
Role of Facilitators	Central role in mediating process, ensuring inclusivity and trust	Heritage sector values balance between content and facilitation; other sectors stress facilitation as emotional and political work
Conflict and Negative Outcomes	Conflict viewed as natural and potentially productive	Heritage experts focus on structured consensus tools; other sectors advocate embracing discomfort and emotional expression
Power Dynamics	Both acknowledge need to manage power asymmetries	Other sectors more explicitly problematise institutional and systemic power imbalances
Participant Selection & Recruitment	Strategic recruitment critical to diversity and quality of engagement	Other sectors stress low-threshold access and informal community ties over formal recruitment channels
Sustainability & Follow-up	Need for ongoing community ownership and long-term structures	Heritage sector often focuses on formal legacy tools (plans, exhibitions); other sectors promote self-organising and emotional bonds
Evaluation	Both use mixed methods (qualitative and quantitative)	Other sectors emphasize emotional impact, trust-building, and symbolic outcomes more than measurable Key Performances Indicators

5.2 From analysis to action: a two-phase framework

Results suggest the importance of structuring participatory processes into two interlinked but distinct phases:

Phase 1 - Context and needs analysis

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As a preliminary step to any participatory process, practitioners must engage in a **deep, structured analysis of the context**. This includes understanding stakeholder needs, power relationships, emotional climates, and potential conflicts.

Tools such as **stakeholder mapping, power/conflict mapping, and emotional landscape assessments** are seen as essential starting points. This phase also includes setting clear, realistic, and collaboratively defined goals for participation (that could be also used as tools to build-up monitoring processes).

Phase 2 - Strategic decision-making and method selection

Based on the insights from the context analysis phase, a **tailored participation strategy** can be created. This includes decisions on:

- The **composition and role of the facilitation team** (internal, external, hybrid)
- The selection of **methods and tools** that align with the goals, participant profile, and available resources.
- The **level of participation** aimed for — ensuring the approach avoids tokenism and genuinely supports shared agency.

The strategic decisions should be adaptable and the strategy must be flexible to changes that might be needed during the process. This dual-phase model may form the backbone of the new **methodological compendium**. It reflects the view that **participation is a process of ongoing negotiation, co-creation, and reflexivity**, not a checklist of activities.

5.3 Emerging suggestions for structure and content

The findings point to a set of thematic pillars that could underpin the structure and content of the Compendium:

Reframing participation and interpretation: Definitions rooted in co-creation, agency, and emotional connection, not just information sharing or consultation. Models illustrating the difference between symbolic and transformative participation.

Deep context analysis: Guidance for mapping stakeholders, power, emotions, and potential risks. Practical templates and checklists.

Customisation and modularity: A “toolbox” of participatory methods that can be combined flexibly. Emphasis on matching tools to the context and participants.

Participatory methods toolkit: Description, strengths/limitations, and use-case scenarios for each method. Methods might include, among others: participatory mapping, storytelling, forum theatre, emotional/sensory walks, co-design workshops, and digital tools.



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Capacity-building for facilitators: Stress the need of multidisciplinary competencies and training; attempt to draw the profile of the “participatory interpretive agent”. Emphasis on soft skills: empathy (but always keeping a rational approach), neutrality, active listening, conflict navigation. Tools for self-assessment and reflection.

Inclusive recruitment and participant management: Strategies or key advice for trust-building, diverse group formation, and inclusive outreach.

Conflict as a resource: Techniques for navigating and embracing conflict as part of authentic engagement. Frameworks for setting group norms, facilitating dialogue, and using creativity in conflict resolution.

Sustainability and community ownership: Tools for designing transitions, setting up local structures, and ensuring long-term engagement beyond the project's lifecycle.

Participatory evaluation: Methods for embedding evaluation into the participatory process. Focus on co-created indicators and narrative forms of reflection.

Facilitation models: Guidance on when to use internal, external, or hybrid teams. Pros/cons, legitimacy, and neutrality considerations.

Ethical foundations: Clear ethical principles and warning signs of misuse (e.g. tokenism). Tools to support ethical reflection and inclusive practice.

