

# A Ritual Process Framework for Participatory Activities: The Case of a Boardroom Drama

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## ABSTRACT

This paper develops the argument that framing participatory activities as design rituals, with the facilitator as ritual leader, researchers and practitioners can plan and analyze activities in relation to the reorganization of symbols of meaning and social relationships, and the work these reorganizations perform. This contribution arises in the search for analytic tools that help increase the effectiveness and relevance of participatory practices in a variety of activities and settings throughout the span of design projects (i.e. meetings, presentations, workshops). The paper analyzes the role of the facilitator during a boardroom role-play activity in a company setting, through the lens of structure and anti-structure during the three stages of the *ritual process*: separation, liminality, and re-incorporation. The dual framework (ritual frame and play frame) of the example illuminates how symbols of power are leveraged to make available certain possibilities, while discouraging other possibilities, as well as the central role the facilitator plays in the production of the process.

## KEYWORDS

facilitation, role-play, ritual process, liminality

## INTRODUCTION TO PARTICIPATORY DESIGN

In the Participatory Design (PD) and cooperative design literature we find a history of engaging people (users, designers, managers, and other stakeholders) in activities in the use domain, the design domain, or ‘neutral’ settings such as workshops [6]. Practitioners of PD seek to stimulate the collaborative design process by engaging participants in design activities using techniques such as mock-ups, future scenarios, games, and drama [2,6,8]. The goals of these activities include making available issues inaccessible through verbal description alone, illuminating obstacles to design solutions that would otherwise only be visible after final release, mediating communication across disciplines and practices, in addition to allowing participants to inscribe their values into the design (process) in ways that

respect the tradition of their practice while transcending that tradition with conceptions of new technologies/practices [1,9].

In order to influence the individual project arena, the company and institutional level, the community level and potentially national levels as championed by PD [3], coherent models for planning, facilitating, analyzing, and discussing various activities relevant to PD project success with people from a wide variety of disciplinary and cultural backgrounds are necessary. This is especially valid in times of exploring the expanding boundaries of design.

To this cause, Muller [6] finds that much of the value of PD activities stems from the ambiguity found in “third spaces” occupied by users and (system) developers, but not belonging to either. He credits the struggle of participants collaboratively working themselves out of ambiguity as the generative force in these third space activities.

I will attempt to contribute to the discussion by introducing the notions of *rites of passage* and *ritual process* as a framework for further thinking about PD activities. To do this, I use an example of boardroom drama role-play activity that concluded a service design project.

## RITUALS OF TRANSFORMATION / RENEWAL

Van Gennep introduced the now popular concept of ‘rites of passage’ [13]. In his analysis of the order and content of ceremonies for the transition of status, (e.g. from boy to man) he found three distinguishable phases: separation, transition and incorporation. Victor Turner [10,11,12] expanded these ideas and found that the notion of “passage” could be found in many types of rites. He focused on the middle phase also referred to as the *liminal* stage or a period of *liminality*.

*“Liminal entities are neither here nor there; they are betwixt and between the positions assigned and arrayed by law, custom, convention, and ceremonial.” [12:95]*

It is through the suspended social order, or liminal phase, that what is normally important is freed from consideration in order to address issues that are otherwise unavailable. For instance, during an initiation ritual for boys, initiads are liberated from their “structural obligations” and in turn are

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able to attend to cosmological issues under the guidance of elders [11:27].

*The first phase (of separation) comprises symbolic behavior signifying the detachment of the individual or group either from an earlier fixed point in the social structure, from a set of cultural conditions (a “state”), or from both. During the intervening “liminal” period, the characteristics of the subject (the “passenger”) are ambiguous; he passes through a cultural realm that has few or none of the attributes of the past or coming state. In the third phase (reaggregation or reincorporation), the passage is consummated. The ritual subject, individual or corporate, is in a relatively stable state once more and, by virtue of this, has rights and obligations vis-à-vis others of a clearly defined and “structural” type; he is expected to behave in accordance with certain customary norms and ethical standards binding on incumbents of social position in a system of such positions. [12:94-95]*

Turner found the concept “communitas” best fit his desire to demonstrate the communal tendencies that transcend common-day social structures of hierarchy and often stimulate (societal/personal) renewal in generative periods of liminality. During communitas, society becomes a community “who submit together to the general authority of the ritual elders” [12:96].

*Liminality may involve a complex sequence of episodes in sacred space-time, and may also include subversive and ludic (or playful) events. The factors of culture are isolated, in so far as it is possible to do this with multivocal symbols (i.e., with the aid of symbol-vehicles--sensorily perceptible forms)...Then the factors or elements of culture may be recombined in numerous, often grotesque ways, grotesque because they are arrayed in terms of possible or fantasized rather than experienced...In other words, liminality people “play” with the elements of the familiar and defamiliarize them. Novelty emerges from unprecedented combinations of familiar elements. [11:27]*

PD has always focused on the social transition between the old and the new. For example, the *future workshop* format of organizing group activity seeks to move people from the problems of today to the solutions of tomorrow through a three-stage process of *critique*, *fantasy*, and *implementation* [4]. After the critique (separation), the facilitators (ritual elders) introduce metaphors (symbol-vehicles) to stimulate “what-if” fantasies (liminality). The implementation phase (reincorporation) involves creating a plan for future action.

#### **CASE: CONCLUDING A PROJECT**

Here I introduce a case in which a veteran design consultant introduces a group activity, a boardroom role-play, to 12

people: 3 design researchers<sup>1</sup>, 4 design practitioners and 5 clients (managers from various departments of the division). The case comes at the end of a 7-month project concerning the design of services for a large Original Equipment Manufacturer (OEM). The OEM, represented by the 5 managers, was exploring whether to begin providing services, rather than merely producing products—a major shift in their business strategy. In two previous papers stemming from this case, we have concentrated on the participatory process of service design [7], and how the role-play activity allowed the clients to explicitly marry their practical concerns of company importance to the ideas from the project report [5]. I will now focus on how the activities were staged, and analyze the activity as an example of a design installation ritual.

The day’s program began with a 19-minute presentation by the lead researcher, a PhD student. She introduced the final report of the project as the participants, sitting around a rectangular table, leafed through the document. The report included the service design process of the project, and the two final design concepts. Most of the participants had been involved in some part of the project process whether in a design workshop, formal meetings, or other activities.

#### **Role-Play Introduction: Roles & Rules**

At the end of the presentation, the senior design consultant (the facilitator) stood-up from his seat, clasped his hands, and introduced an activity.

*...we discussed a bit how we move on from here. Because...as you all know, as soon as somebody presents an idea which isn’t your own, then the ‘not invented here’ effect immediately pops up. So, I thought we’d do a little trick to suspend it for half an hour or so [...] I mean clearly we need to translate this into [company] language.*

The facilitator proposed a boardroom drama with a pitch team, and a board team facing-off against each other. From a prepared list, he introduced four teams of three, and assigned each to team one of the two service concepts from the final report. He first addressed the pitch team and then the board team:

*Now, try to imagine that, in half an hour or so, you have to put this proposal to your board. Find all the strong arguments. Make it a bit extreme, [...] come up with like the three most important sales arguments [...] also try to explain how this will make money. The other two teams, you have this unique opportunity of imagining that you are a board of directors. So you have to come up with all the critical questions that you would ask. [...] Don’t make the list too long. I mean, cut it down to like the three most*

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<sup>1</sup> I was a participant observer in the case as I had been one of the two main researchers in the project, and I filmed parts of the meeting while my colleague filmed the rest.

*important points. [...] So, for a short while, don't think about whether you like the idea or not. Make it a strong case and let's try afterward when we have all the arguments out in the open, then we can discuss whether this is [...] actually interesting to [the company] or not.*

As everyone began standing from the table and finding their teammates to prepare for the drama, the facilitator asked the managers whether the vice president's office was available to "give some atmosphere for this little thing". There were joking comments, i.e. "the place where ideas get shot down" and some group laughter.

### **Boardroom Role-Play Drama**

After 20 to 30 minutes of preparation in groups in separate rooms, everyone gathered in the vice president's office and the two teams with the first idea sat on either side of the oval table. The facilitator then introduced the role-play rules:

*We've got the case presenters here. We've got the board here. Now if you get, [especially] the case presenters, if you get in a tricky situation, you're allowed to call for a timeout. Probably you can't do that in a board meeting, but imagine if you call for a timeout an invisible wall goes down here [motions with arm] and you can discuss a bit among yourselves how you make the next step. O.K.!*

The pitch team introduced their project idea, and the board raised some questions. After the second question from the board, the pitch team abruptly called for a timeout.

*Board (manager): You can see actually by [...] by doing this we are going into our customers' field operation. We take away uh revenues, earnings from them. Some of them.[...] Because they will not get the same amount of service calls anymore and we will be in competition with our customers. How do you feel about that?*

*Audience: "oops"*

*Pitch (researcher): Can we call a time out?...I haven't seen uh, we are on an official time out.*

The pitch team discussed their response for 90 seconds.

*Pitch (manager): Yeah it's the contractors.[...] he can take in new customers and he can in that way improve his business and securing he is doing what he is really good at and not a lot of minor things that can be solved in another way and that's the one issue. The other issue is that we don't see this as a, that we are in competition with the contractor because we also want to involve the contractor in this kind of business with the supermarkets. The contractors is our tool in helping the supermarkets solve the real problems in the supermarket in the refrigeration part of it. So they are not at all cut out. We just insure that they are more effective in the work that they are doing.*

After two 15-minutes rounds, the role-play ended abruptly in the midst of a discussion between the pitch team and board team, when the facilitator stepped toward the table, began bowing and interrupted the discussion saying, "Thank you".

Everybody then returned to the presentation room and participated in an evaluation of the project process, the tools and the outcome. The facilitator asked each person to write on Post-It notes, three positive and three negative impressions, and then to present them to the group. It is important to note that at no time when the group was together did they return to the discussion of whether the ideas were interesting for the company or not.

### **RITUAL PROCESS FRAME OF ANALYSIS**

This example can be split into four distinct phases:

Phase I: project report presentation (19 min.)

Phase II: role-play preparation in groups (20-30 min.)

Phase III: boardroom role-play event (30 min.)

Phase IV: project and process evaluation (40 min.)

Phases I & IV are activities that, loosely speaking, abide by the normative laws of the social structure. This suggests the *fixed point in the social structure* was the initial presentation when the lead researcher presented the final report of the project to the client. It is in the phases II & III, from the time the senior consultant stood from his chair and spoke (separation from the fixed point), to the moment he put his hands together and bowed interrupting the role-play (reincorporation into the normative structure), that can be viewed as a liminal period of anti-structure.

The separation from structure occurred through the facilitator's explicit justifications for the upcoming activity, and the roles and rules he assigned. He cited the threat of the 'not invented here' effect blocking the ideas and the need to translate the report into to company language, and then he created mixed teams of company managers, researchers and practitioners, assigning new roles. The dramatization of the situation symbolized the cohesion of the company insiders, including himself, while signifying that the project report and its authors were outsiders. He then offered a redressive activity to overcome the barrier. He asked for strong arguments that were extreme and provocative. By invoking the local understandings of the social structure of the company, and assigning a *play frame* for experimentation referring to it as a "little trick" and "this little thing," and arranging for the role-play to take place in the vice presents office, the facilitator reassigned meaning to some symbols, while reinforcing the meaning of others.

The liminal state continued throughout the preparations for the role-play when each team read through the report seeking their argumentative points, a role prescribed to

encourage them to identify points that did not necessarily match their non-play roles. The activity reconfigured the relationship between the company managers and their guests, bringing with it a communal approach to developing points for and against the proposal both before and during the performance. For example, after the time-out called by a researcher in response to a question the pitch team had not discussed during their preparations, the manager delivered two arguments for why the company would not be encroaching upon the business of their current partners. The manager performed the arguments in a way that reflected both his understanding of the proposed idea, and the ease at which he constructed strategic insights about how to overcome the potential breach of their company interests. This is a question that, under the normative structure of phase I, may have been asked by a manager to the research team.

Rather than act toward dissolving the normative hierarchical structure of the company, as often hailed in the early years of PD, the ritual reinforced the authority of the board room and board members. It allowed the participants to inscribe their views and practice of expressing those onto the new ideas. This would suggest that the ideas became a symbol inscribed, not only with the views of the participants, but also with the practice of voicing those ideas in relation to counter-arguments.

## DISCUSSION

As a rite of passage for installation of new ideas into one level of the company, the master of ceremonies created a play frame to allow company members and their guests to perform a ritual that symbolized the official adoption of new ideas into the company at the sacred (boardroom) level. Through a process of rearranging the symbolic field assigning new meaning to some symbols while exaggerating the meaning of others, the elder extended the liminal period of the current rite. Communally, on public display, the participants playfully submitted the initial (proposed ideas) to acts of humiliation exaggerating its strengths and weaknesses preparing it and the participants for its future role as a social symbol.

Developing rituals for bridging barriers through leveling activities has been a major goal in participatory design. The ritual framework with its emphasis on transition facilitated through a limited period of activity of rearranging symbols of meaning, acknowledges the social and situated nature of multivocal symbols. As the example suggests, the co-production of roles and symbols, including the role of the ritual elder, is performed by all the participants. The ritual frame provides a reminder that transferring ideas is not merely about method, but rather dependent upon the facilitator's ability to leverage symbolic understandings of the communities from which the practice is born and of where it shall be introduced.

I will conclude with a quote from Victor Turner:

*Ritual says "let us believe," while play says, "this is make believe."* [10:142]

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