



## **CASE STUDY 2**

### **REFINEMENT OF THE METHODOLOGY**

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Case Study 2 comprised a close-knit collaboration with Newbold Trust, a social enterprise committed to sustainability and based in Forres

## GRAPHIC NOVEL: VOLUME III

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Volume III discloses the practical element of this doctoral study, complementing chapter 6. With focus on the socio-emotional interactions among the participants and their interaction with the social environment supporting the research situations. The reflective drawings are displayed entangled with my own reflections and the participants' reflections and insights.

Legend for the different type of bubbles used in this document:

General explanation, fact narration and contextual reflexions from my point of view.



Find the full transcripts from where the quotes in this document have been extracted in Appendix 5.4

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## Case Study 2. Refinement of the Methodology

This graphic novel illustrates the practice element of the study:

### Getting Together: A Context-based Study on Informal-Mutual Learning and Community Co-design with Cultural-Historical Activity Theory.

Mirian Rodriguez Calvo

Thesis submitted in partial fulfilment of the requirements of The Glasgow School of Art for the degree of Doctor of Philosophy



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Newbold Trust is a social enterprise set up in 1982 that has been self-managed by a group of trustees aided by the management and operational skills of a resident team of members and volunteers. The organisation offers a variety of services aimed at supporting a sustainable way of living with people and the environment. They promote alternative ways of living and working together as a response to the increasing social and financial constraints. They provide workshops, courses and community living experiences designed to build wellbeing and develop connection and practical skills for a positive and sustainable future.

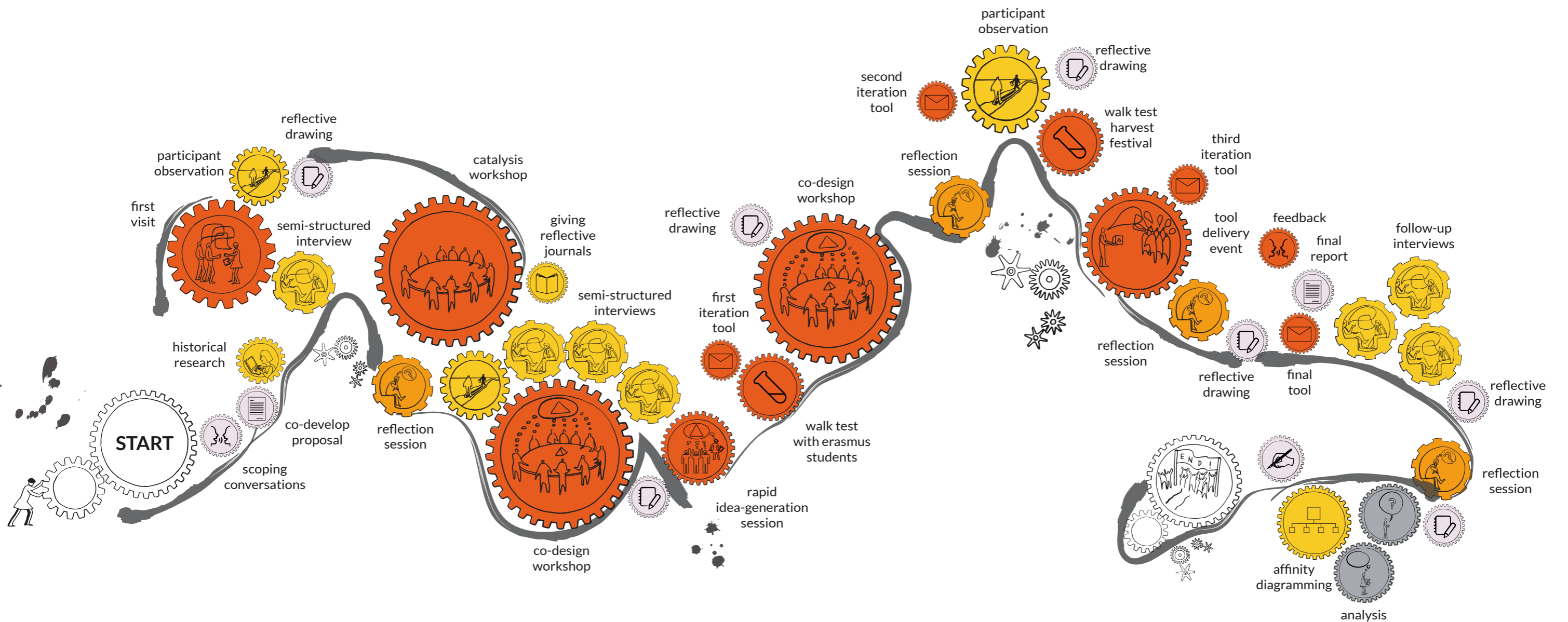
Located in a seven-acre property containing a large Victorian house (1893) and two greenhouses in the outskirts of Forres, on the Moray coast, approximately 25 miles east of Inverness, the Newbold community is small: four trustees, eight staff members and around nine volunteers who come from around the world, mainly through the Findhorn Foundation's connections. The Newbold community uses the Victorian house as a guesthouse and its physical assets allow for the hosting of a large variety of workshops and seminars. People also live there. The combination of living and working within the same physical space means this community has developed tight bonds among its members.



17 August Newbold House

In this project I spent four visits living with the Newbold community, allowing me to accelerate my immersion as an outsider-insider. From there I could navigate their social life and access certain spheres of privacy - observing their behaviour behind closed doors. For me, this case study was the most immersive and intense project of all those conducted during this doctorate. The conjunction of several features created a favourable research context to support the experimentation of an immersive approach. So I stayed with them in a space somewhere between guest and researcher. In time, I became a more meaningful person for some of them, a friend. Towards the project, they began perceiving me as one of them.

At the beginning of 2017, the trust initiated a transformative process, shifting away from an organic and unstructured community to a social enterprise. This internal shift would involve renewal of both its physical assets and its identity as a social enterprise. The community reflected on their role within the local community and the insight was that, although they had been in Forres for the last 35 years, the community felt isolated from community life in Forres and the Moray area. Participant 1 (P1) described to me the need to initiate a long-term community engagement process with the communities living and operating in the area.



# Preparation for Co-design

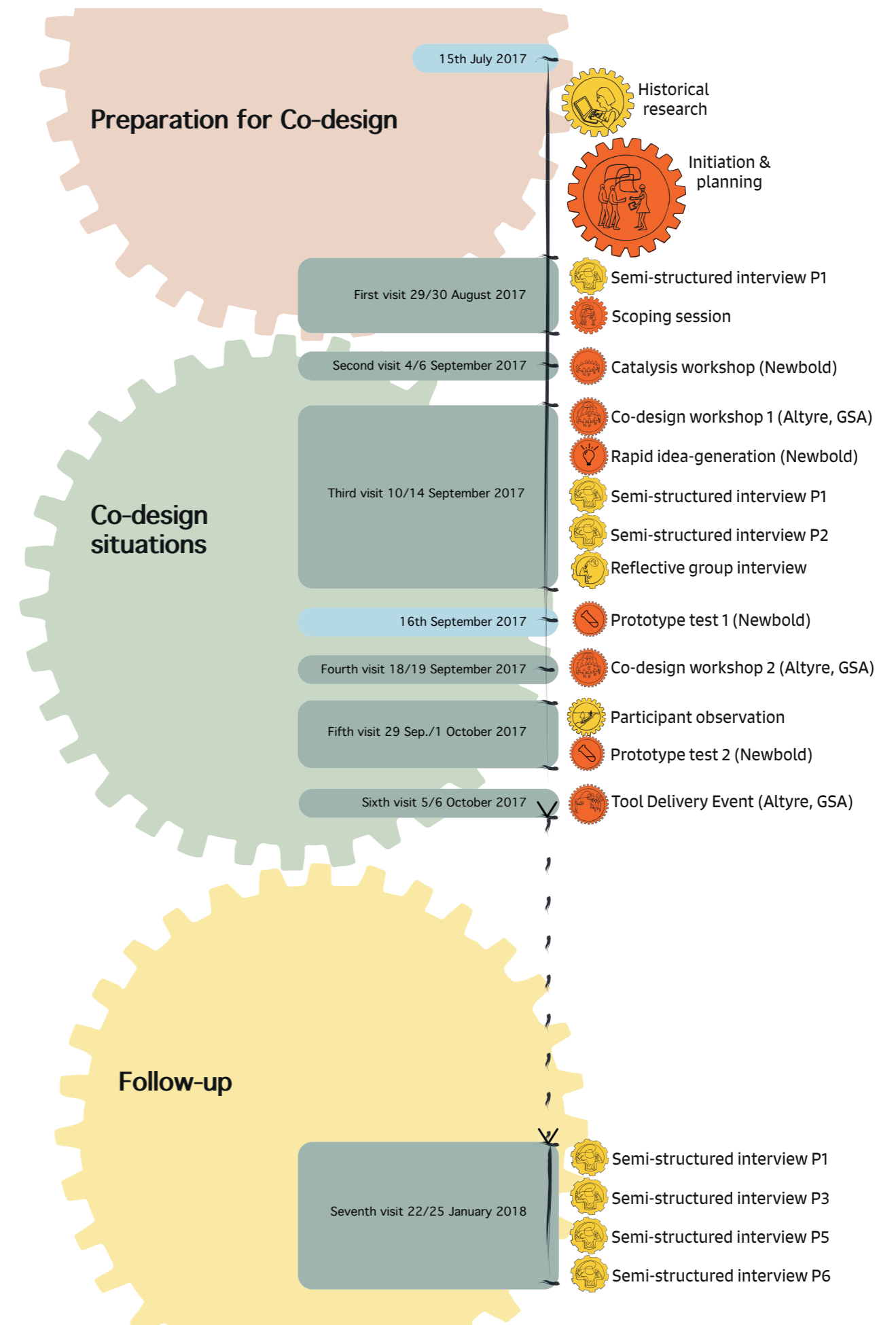


## Initiation and Planning

Once both parties (Leapfrog and Newbold) approved the proposal, we set up a timeline with dates for the co-design events, held over a month

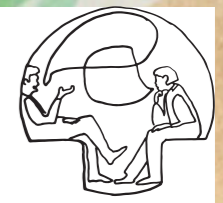
We designed a leaflet to invite local communities to participate and circulated it through our networks. I also made some changes to the reflective journals based on the CSI participants' feedback, which consisted of introducing prompt questions in all the pages and some minor design touches.

It was useful to have prompt questions to trigger off a train of thinking, and helps me consolidate any learning to a deeper level of consciousness and awareness



on my first visit I walked from the centre of Forres. It was a sunny day and the walk took me about half an hour. The road went through residential areas. As I moved away from the village, the vegetation acquired a greater prominence in the landscape. At the main gate, just after passing Leancoil Hospital, I found a small sign saying Newbold House, alongside a stall with a basketful of apples and a small basket to leave money.

## Semi-structured interview with PI & scoping session



The interview was held in PI's office. The room had a large window overlooking the main entrance. From his office, PI could observe people arriving at the community. PI began our conversation by sharing the history of the property back to 1893, when it was built for a coronel who had served in India.

The property lay abandoned for a while until another family in the area bought it at a knockdown price and made it into a hotel.

In 1979, Findhorn Foundation rented it and a group of members settled there. In 1982 the same group of people formed the Newbold Trust. Since then the community has lived a fairly bohemian lifestyle.



Newbold House [main gate]

1/30/8/17



PI continued the story of Newbold and how they decided to initiate a transformation towards a social enterprise model. Here I made explicit that he was an expert, bringing his perspective and that without his valuable contribution and accountability the project would not be possible.



Afterwards, we did a two-hour tour around the property. Through walking the grounds, we realised that, in fact, walking had a great deal within the nature of the project, focused on exploring ways to engage global communities and have a say in the renewal of their spatial assets. In light with this, I set up a deliberative walk as the method to explore.



# Co-design situations



## Preparation for a deliberative walk

When I went back to Glasgow, I devised the flow of the catalysis workshop and the tools to support the orchestration and choreography of activities directed to guide the participants to reach agreement on the directions that the project would take.



## catalysis workshop



I arrived at Newbold House the day before and stayed there. I felt welcomed. The project aroused great curiosity amongst the members of the community. We had breakfast, lunch and dinner together. In these situations volunteers or staff members came to me asking about the project.

I drew the map of the property and traced the route of the walk with nine spots previously agreed with P1 (Figure 6.3. on page 162). P1 prepared the narrative that would be disclosed on each spot, based on our conversations during our first meeting. We made sure that several local communities were informed about the workshop in order to ensure a multiplicity of perspectives and expertise (divergence).



That morning, I remember having breakfast with P2 who disclosed her interest with a series of questions. I answered her, feeling the pressure of being somehow interrogated. I was aware that first impressions are often crucial in gaining people's trust and in awakening their motivations.



In the morning I went to the creative campus to print the materials and the tools for the workshop. Then I came back to Newbold House, PI showed me the room where Activity 2 would be hosted, a reflective session about the walk experience. The room was spacious but dark. It smelled dusty and old. The walls were painted fern-green, with wooden cladding 1.5 metres high (human scale). A large window with three arches overlooked the main entrance, on the ground floor, with access to the back of the house. It was a ceremonial room, with a large fireplace and decoration to the taste of Victorian times, with filigree and ornaments inspired by nature.

I distributed twelve chairs in a circle with a whiteboard where I stuck the AI blank map aimed at collecting the insights. Then I put the tool pack on each chair and waited until everything began.

I felt nervous. I knew this first workshop was important - for keeping the participants motivated and committed, as well as settling inclusive group dynamics and sending the message that this was an open and friendly environment. At the same time it was the first time experimenting with the deliberative walk, an opportunity for me to learn about this tell-technique.



Before I began, I adjusted my energies to find courage and confidence, the basis for creating a safe and relaxed atmosphere.

The facilitator needs to send implicit and subtle messages of confidence to the audience. The projection of such environmental conditions goes from inside to outside and it entails the use of socio-emotional competences such as emotional awareness, regulation of emotions, empathy and listening. Such competences influence the co-creation of favourable social atmospheres for collective creativity to emerge, and for satisfactory and productive group collaboration.

Please, take your reflective journal and use it during the project. It is meant to support your personal reflections and I am going to explain its use.



People seemed excited and intrigued about the whole process, relaxed and focused on my voice. Then we got our coats and tools and followed PI who was about to facilitate Activity 1: the deliberative walk.

We gathered at the main (St. Leonard Road) entrance. At this point there were many comments. For PI, this spot was dark and unwelcoming.

This is the most important place to start because this is where the physical interaction happens between the visitors and the house.

We moved to the second spot. They were laughing, exteriorising their joy.



It is quite nice this scenery, isn't it? ha ha ha

You know I always have this lovely feeling of coming home in this drive.

Oh, me too!

I know the different flowers I have seen here!

Oh it is so beautiful. You know what, walking slowly is fantastic. Also it is creating awareness of this place, raising my consciousness, I can feel it. We usually just drive very quickly, we do not really walk through.

They talked about their favourite routes to walk around the estate.



The woods were planted in Victorian times. At that time, the rhododendrons were planted to define the driveway. Now the trees looked wild and somewhat abandoned to their fate.

In the spring they are fabulous with colours. The thing is that the rest of the year you feel like you are entering a restricted area.

We stopped at the car park, looking at the main facade of the house. Opinions diverged. The staff members observed a behaviour pattern in which visitors, when they reached this point, were unable to orient themselves due to the confusing signals of the place. The dense and neglected vegetation was considered a visual barrier. Conversely, local community members stated that the main door offered a sense of safety.



Once you cross it, you can feel secure on a wintry or rainy day



We moved towards the next spot: the garden. We stopped at the red greenhouse.

When the house was built, they also built a heating system with brick channels, distributed throughout the garden, to heat it, allowing the growth of exotic fruits. The chimney attached to the north wall helped heat the water.

This spot usually hosts tea gatherings

We also run educational workshops related to the garden during summer.

We could explore the educational dimension: lessons, workshops, or an outdoor kitchen.

We continued with our tour and reached the fourth point: the ruined gardener's shelter at the northeast corner. Apparently that location is the one receiving most sunlight in the estate. The brick wall was used to grow berries.

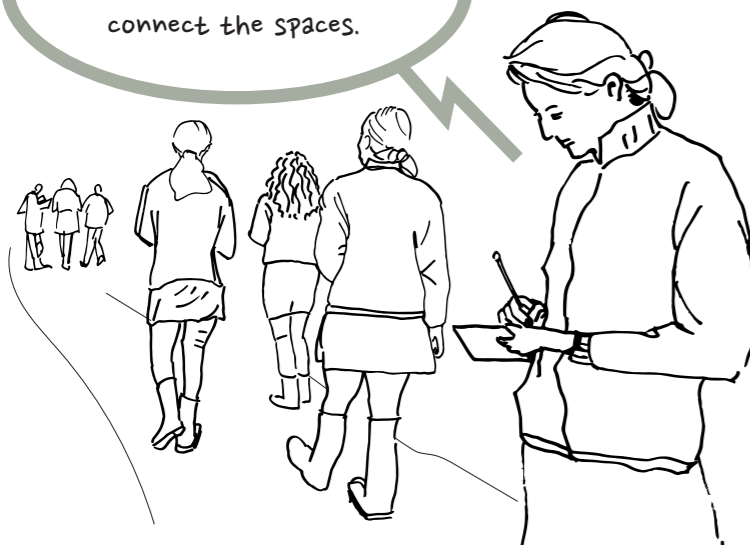
This is my favourite spot of the house because it is a quiet space that could be used for contemplative activities.

To reach the fifth spot, we went through a wooden door camouflaged in the wall. We arrived at a wild natural space with a yurt, almost-imperceptible walls hidden among the undergrowth and a clearing in the forest. The forest behind, which grew more and more leafy, was no longer part of the estate, but a municipal forest. A fence with two metal wires separated Newbold from another property to the south.

This area is a good location to develop accommodation for staff, and hence solve the interpersonal frictions caused by living and working in the same space

It began to rain, but people did not bother too much, fastening coats, raising hoods and Pll put up an umbrella. They kept walking and laughing. We reached the sixth spot: a wooden shelter which was a workshop for recycling, keeping gardening tools, or drying wood. At that moment, it offered shelter from the rain. We moved to the seventh spot: the conservatory, a nineteenth-century greenhouse now rather dilapidated. Some participants stopped to write/draw their impressions. We entered the greenhouse. Here we talked about the need to combine efforts towards its restoration.

We are talking about connections and how to connect the spaces.



From there, we walked back to the Victorian house and went to visit the meditation room and the gym/yoga space.



They debated about different ideas to solve the isolation issue.



At the end of the walk, we decided to take a break, get a coffee and come back to the room for the reflective session.

## Activity 2

I asked them to spend ten minutes thinking individually about the experience on the walk. While I was talking, everyone was in silence.

Focus on two aspects:  
on the walk itself, and the tools we used  
during the walk.

I  
felt freedom  
when people were walking;  
we were not in this situation,  
staring at each other. Here it is  
more difficult to express myself.  
When we were walking, we  
were talking at the same  
time freely.



They agreed that the walk was a good method to engage with newcomers, and suggested doing the walk with the Erasmus student groups over the weekend. These insights informed the next co-design workshop, hosted at the creative campus, in Altyre. An insight transpired from the walk, where local communities perceived Newbold Trust as an isolated organisation who wanted to live isolated from public and community life in Forres. See my reflections about this co-design workshop in Section 6.2.2 Reflective Session.



## co-design workshop 1

Activity 1: Hang-it-up

Together we spent the day developing a series of activities aimed at sparking ideas about tools that could be used in a deliberative walk. The workshop was located in the west wing of the Renaissance wing, where there were four large tables. I arrived early in the morning to print the materials and tools. The weather was changing and there was a forecast of rain, so I decided to redesign activity 3: Discovering Altyre. I had designed the discovery game to be held outdoors in Altyre. Due to the possibility of rain, I changed the route, adding two interior spaces. Then I put all the material on one of the tables and distributed sharpies and the ICFs on the other three tables where the participants would sit, forming groups of three-to-five people. When RI arrived, he helped me place the string for activity 1 and the AI maps on the opposite wall. The catering arrived and RI distributed the food nicely on the table, at the kitchen. We were ready to begin.

During the week I had analysed the data from the catalysis workshop. I had organised the insights into what I interpreted as short-term, medium-term and long-term aspirations, devising a series of insight-cards. As a method of engaging the group with these insights and to shape their thinking about what was valuable to them in terms of renewal, I invited them to re-arrange the cards into their own order of importance.



## Activity 2: priority building

We realised that some medium-term and long-term interventions were located at the beginning of the thread, whereas some short-term interventions were at the end.

We all know that the accommodation problem has to be prioritised

We need to agree as a community how we want to use these spaces and then we can actually start building

Eyes focused on the person who was now speaking. I asked them to get some notes and write their priority aspirations. Then they would stick them on the map - with two lines depicting a cross. Each line represented a dimension: quick-long and easy-difficult, drawing four squares to place their priorities in.

I have not seen anything about communicating what we are doing to the public. All the projects that I have seen, they seem to be focused on the renewal of Newbold without local communities knowing.

I think I can answer that. Once we started with this project, my understanding was that this is about developing a project with a focus on the infrastructure of the house; it seemed to be orientated around the physical space.

The idea was to then, as this process is going on, continue to do these walks with people from the outside community



Here I noticed, again, a behavioural pattern of the trustees questioning the staff decisions and, to some extent, trying to persuade them to align with their thinking. This type of interaction seemed to me to be similar to parents asking their children how they did something. The question sought to better understand the context of the project, but in the way the question was framed, it implied a value judgment and a validation (or not) of the answer. This highlighted Pit's position of power over the rest.

This task unveiled a key insight: the need for prioritising interventions. certain interventions seemed to the group to be more valuable for them as they embraced their collective values, for instance, the renewal of the conservatory, valued as a difficult long-term aspiration.

### Activity 3: Discovering Altyre

I gave them a booklet comprising a map of the campus, another sheet containing five pictures of indoor and outdoor scenes, and a third sheet with a blank space to write/draw their insights. They needed to discover the places matching the pictures and annotate them on the map, then write/draw their impressions of each place. This led to gaining a deeper understanding about the relevance of two-way communication and reflecting on the planning of walking, and it kept motivation high.



### Activity 4: Gathering to share experiences on the walk. Find more information about the importance of the narrative in section 6.2.2 co-design workshop 1.

Another element for me was feeling quite excited with everything I saw. It was imagining what it could be. There is space for creativity everywhere

I was excited about discovering the buildings, feeling like a child.



I think it is interesting - similar to when we were using the tool in Newbold -, we were imagining how the space could be transformed with the narrative. How do we develop that thing and how do we tell the story right from the entry gate? It is really the narrative, the story that we want to tell to people.

What came to me was the importance of re-visiting and remaining connected, and regularly walking that walk and being in touch with things because then, things start to be developed in ideas and get more grounded.



## Activity 5

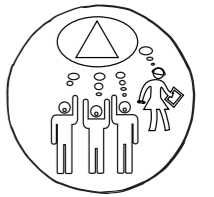
Firstly, they had a dialogue around what would be the focus. The first group focused on pragmatic aspects such as how to build a narrative around the walk, which conveyed the idea of welcoming. The second group was inspired by the idea of identifying potential uses for locations. The third aimed to structure a walk capable of amplifying emotions.



We co-developed three potential routes within Newbold House: the first concept explored how to embed the tools within the space; the second concept explored the consequences of having a free tour, without facilitation; and the third idea explored how the tools might be able to capture the walkers' feelings engaging with the various spaces. They presented their concepts and we agreed on focusing on a facilitated walk tied to the renewal purpose: envisioning the renewal assets of Newbold House.



## Rapid Idea-generation session



On the following day, I gathered with four Newbold members after lunch for a rapid and improvised idea-generation session. This was a community-driven initiative where some of them proposed to test the walk with the upcoming Erasmus students visit. The concept generated consisted of two folding postcards, which could be divided: The first postcard was meant to be for the participants to keep as a souvenir, a gesture signifying the intention of building a bi-directional conversation. On the front, we agreed to add a picture of the Victorian house, a symbol of the past. On the back we designed a logo, meant to guide the facilitator when providing information during the walk, with the guiding principles of Newbold Trust.

The second postcard was devised to invite the participants to write/draw their reflections. The front bore a picture of a specific space within the property. On the back we left a blank space, as in traditional postcards, for the students to express their thoughts with the sentence beginning: "Dear Newbold House". We planned the route based on time and purpose. We marked three spots outdoors.





## Semi-structured interview: P1

When asked about his motivations, he explained it by narrating his personal story:

Six years ago I had an awakening. I was always working for these big brands. They have the power in the world. I realised it was not the right way to help. So I started studying again. When I finished, I came here as a volunteer. They offered me a position. I did not go back to Spain. I left my job and my life in Madrid.



## Semi-structured interview: P2

She offered insights into her motivation:

I was in a community before I came here. Then the community dissolved. Then I spent a lot of time without having an immediate community, like a living community and I missed it. I just needed more stimulation, connection with people. (...) I think the different tools and the way it has been brought to me, it feels very creative.

Between the rapid idea-generation session and the second co-design workshop there was a first Prototype test. Find further information on that subject in Section 6.2.2 co-design workshop 2.

## Reflective group interview



The next interview involved P3 and P4. It was held in the same piano room. The atmosphere was again relaxed. They shared their motivations to live in community, P3 was from the area and after his studies he returned to become a staff member in Newbold Trust. P4 expressed her expectations on the project. She valued the process rather than the tools or methods and recognised transformative agency in the way they were interacting with each other.

I wanted to come back to the community I grew up in. So, to come back as an adult that is able to give something back

I am interested in seeing how we are coming together as a team, working together and not just running the place

This tool is very physical, local community-oriented





## co-design workshop 2

In between workshop sessions, I devised the activities for the next one. central to this session was to reflect back on the test and produce a greater understanding of the functions and use of the engagement tool, thereby improving/iterating the tool based on collective reflection.

It was very powerful using this because the tool gave us structure and the individuality came from me about how I did the tour. It gave me structure and allowed me a degree of freedom but with some guidelines. It gave me much more confidence doing this.



I felt it would be better to include sections like here about feelings and envisioning the future, prompting words.

I was pleased with the process. It needed more preparation and focus on what we want from our groups.



Activity 1

They participated in a conversation on which situations and with whom they would use the walk as an engagement tool. We concluded that the tool and the walk enabled bidirectional and focused conversations, and heightened collective creativity and the use of imagination.



## Activity 2

The first group focused on improving the tool in a simple and easy-to-make way.

Other group came up with four folding postcards. An insight arose: a formal invitation to their personal contacts was the most effective way to bring local communities. So we added an invitation postcard.

I think the important things are the house and grounds, and then the volunteers and then food. I think that is the three things we need to have in images.



After sharing personal stories, we produced the second iteration of the tool, which came in two versions. The

short version focused on facilitating a light-touch engagement, easy-to-use. It consisted of two folding postcards - following the first iteration - and we added images that met the criteria: people, dynamism, the grounds, food and the volunteers. The long version had four folding postcards. The first two ones followed the initial idea: the first one as a souvenir, and the second one to capture participants' observations, reflection-in-action. The third one aimed to capture reflection-on-action - once the participants were back home, they could send the postcard with their reflections. The fourth one was devised as an invitation where the participants could invite their friends to participate in another walk.

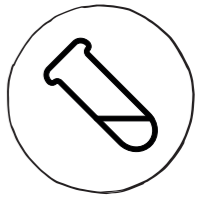


## Participant observation and...

The festival is one of the most important organic food events in the Moray area and brought together a large number of providers such as Sky Delights (Nairn), Roots, Fruits and Leaves (Across Moray), Manna Juice (Elgin), Roseisle Gardens (College of Roseisle) and The Bread Kiln (Garmouth). With products from their garden, the Newbold community cooked organic meals for the visitors, which this year reached just over 200 people.



At first, we thought it would be better to try the long version with the four different postcards and observe how the walkers interacted with it. We planned two deliberative walks focused on the garden. However, when I arrived, I soon discovered that there were many different activities happening at the same time, so the volunteers and staff members were really busy. Before the walk, I spoke to P5, who was about to facilitate it, about the tool prototypes that I had brought with me. We agreed to use the short version. This decision was made for two reasons.



## ... prototype-test 2



In the afternoon we gathered in the main door of the Victorian house to participate in the deliberative walk. P5 introduced the walk and distributed the tool to the visitors who joined us.



P5 also introduced our project and me. He invited us to look at the Victorian building.



After telling the story of the Newbold community, more participants asked questions about how they live. We passed through the apple trees, saw the hens and the sheep, crossed the small contemplative bench and arrived at the red greenhouse.



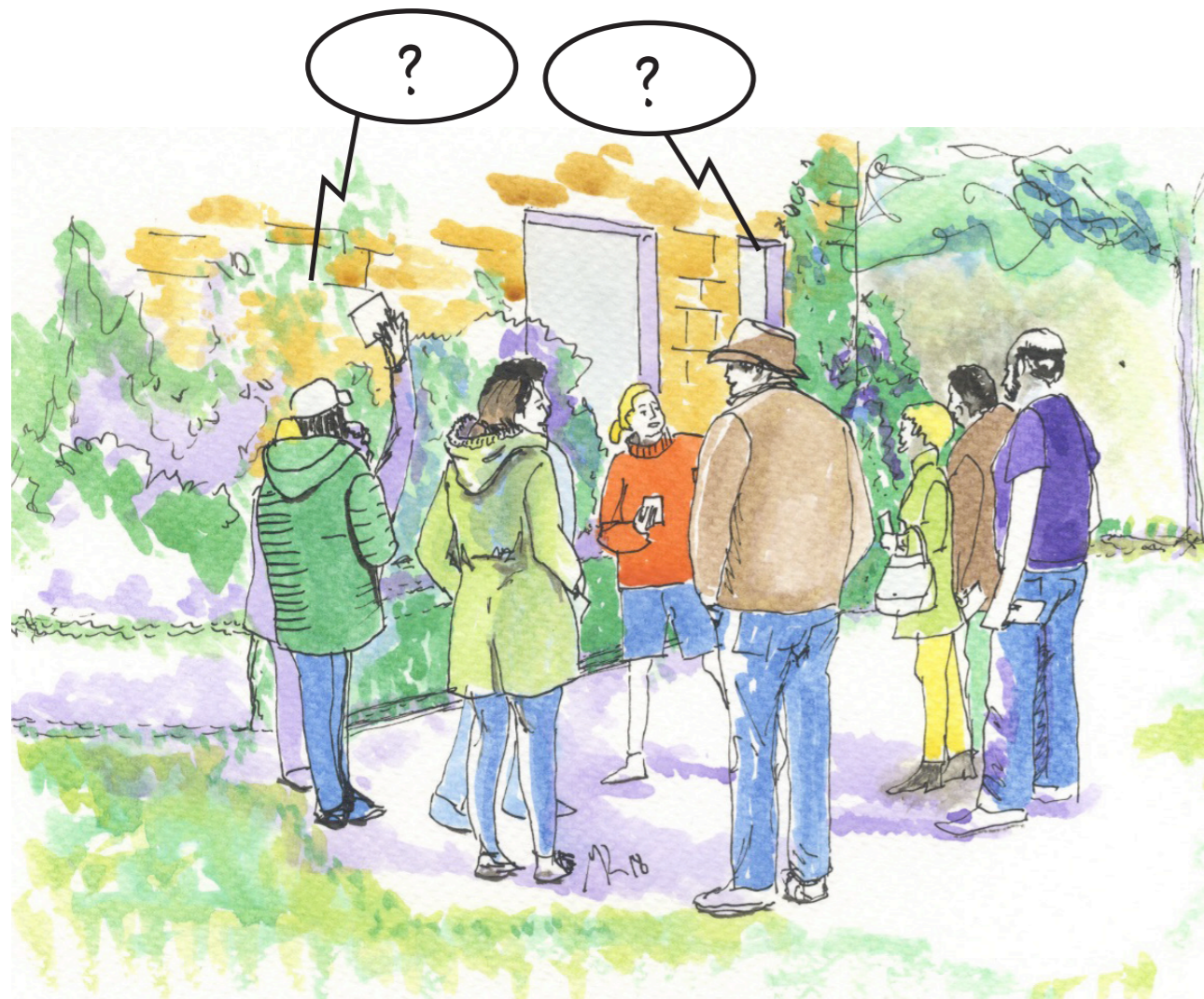
P5 opened the greenhouse and we entered. He explained how they followed permaculture approaches to cultivate their vegetables. This sparked informal discussions between the visitors who shared their interests on the values aligned to their way of living.



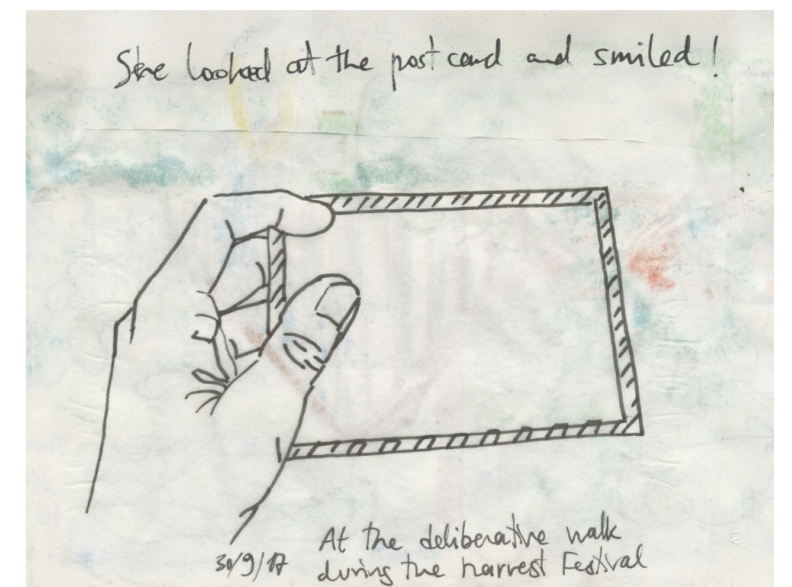
From there, we advanced to the northeast corner of the brick wall, with the shelter ruins. The bushes were full of flowers and dozens of butterflies.

crossing the wooden door in the wall, we arrived at the feral area, where nature expressed itself with greater forcefulness: in the forest glade, with a yurt in the middle. P5 turned our attention to two wooden constructions that contained hives to produce honey. Then he shared the community wish of building staff accommodations in that space.

This aroused a battery of questions aimed at helping walkers to imagine a settlement of yurts dispersed in space. They also were curious about the hive structures and P5 expanded on the process of making their own honey.



They paid attention to the flowers; they smelled them, took pictures and conversed around the past, present and future of Newbold. They were also able to imagine/envision potential accommodation. We walked back to the last spot, in front of the conservatory. He invited them to envision the future of Newbold and write or draw their impressions about the Harvest Festival using the postcards. They kept the first postcard as a souvenir and left the second one at the gate.



We noted that for other type of events, with fewer people around, and as a systematic engagement, the long version could be facilitated alongside a focused walk and hence gather enriched data. One insight was that the invitation postcard could be redesigned in the shape of an envelope, so the other cards could be saved.



## Tool Delivery Event

At the end of the following week, we came together for our last workshop. This final event was held on the creative campus at the Glasgow School of Art in Forres.

After a reflective session watching pictures of the process in a projector, we moved to the kitchen and we sat around the table with coffee and biscuits. On the table, there were the different components of tools printed out in A4 and distributed in blocks. In one block there were the three postcards.

The first one, called the purpose card, was designed as a souvenir of the walk to give away to the walkers, where we included the logo and the principles of the Newbold Trust.

The second one, called the reflective postcard, was designed to capture the walkers' reflections during the walk.

The third one, called the send-us-a-postcard-postcard, was designed to give to the walkers and capture their reflections once they went back home, so they would write their reflections on the walk and would send them back to Newbold Trust.





In another block, there was the envelope, which was designed to hold the postcards and given to the walkers as an invitation to participate in the walk. There were also scissors, post-its and pens for them to alter the tool and provide feedback.



First they looked at the components and how all of the components would work together. Then they cut up the components and collectively began to talk about in what ways they could use the tool. Here we discovered that the envelope had such a function, so we began to think further about the type of information that should be provided on it to the people invited in order to make explicit the value of participating in the walk.



We concluded that the tool was flexible enough, at that stage, to be tailored according to their needs. It was agreed that the tool was able to help the facilitator to perform the walk by giving structure. Simultaneously, the tool was able to formalise the process of capturing the walkers' insights. In other words, we needed to refine things further in order to make it possible for these participants and other communities to use the tool in wider contexts. I made some finishing touches to the tool during the last month. I also spent some time assembling its guidelines in collaboration with Newbold Trust.

# Follow-up



## Interview: P1

The interview was conducted at P1's office, again. We acknowledged our contributions to ignite the project and make it happen. Over this process we had developed a relationship of mutual respect that ended up as one of friendship.

We had embedded the walk in different activities. For instance, they used the walk as way to engage with the Moray council and they were running a walk for students the following day. They were also thinking of using it with the new volunteers arriving soon.

This statement unfolded the insight that the community was still in the process of articulating the focus of their engagement; even they were experimenting with whom to engage. It seemed to me that in certain aspects it was still too soon to see which direction our project would take.



## Interview: P3



His motivation was related to his personal interest in connecting Newbold with local communities. After that, we reflected on the process.

What we really struggled to do was to define why we were doing it. I think that is the work that still needs to be done. Sometimes that is not hands-on, it is a lot more reflective. I think the design part is done, the product is done, it's how we are communicating what the tool is, that is the work that needs to be done.



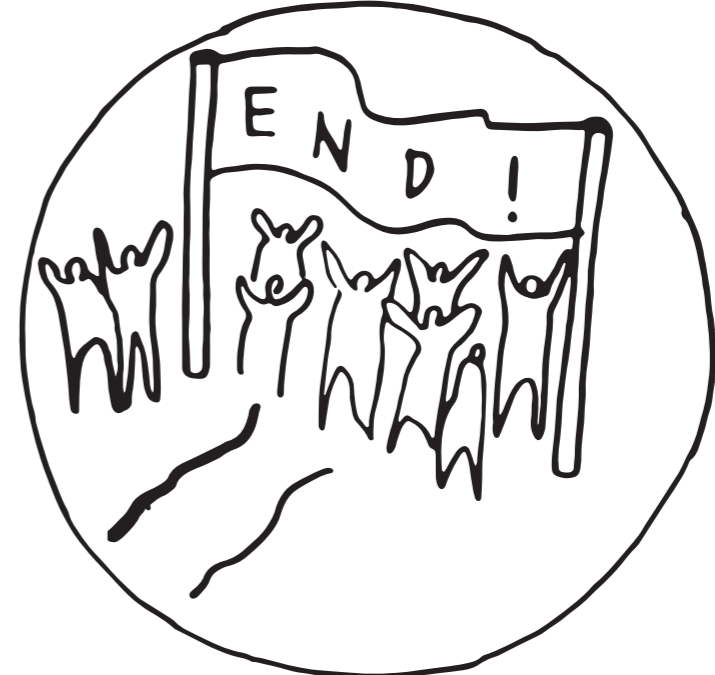


# Interview: P6

At the beginning it was curiosity and also responsibility, being a trustee. After, I just wanted to do it because it became really interesting

Something I did not know was that at, at that time, the community was experiencing hardship and they were looking to ensure their survival.

I think what was going on in Newbold, at that time we came together, it was worried about survival. The pressure of that worry about survival and not knowing what to do next was occupying some part of everybody's mind.



Thanks to all the people involved in the project!

To delve deeper into the items and patterns discovered after the exploratory and experimental analysis see Section two: systematising learning, chapter 6.3 complemented by the visualization of the Audio-visual Narrative: The Space Between III.



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