PARTICIPATORY URBAN PLANNING

Planning the city with and for its citizens

MONTRÉAL
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INTRODUCTION

It is November 2010 in the Plateau-Est Green Neighbourhood in Montréal. Fifty people, citizens and elected officials, have gathered together to decide on the future of their living environment. At the heart of the discussion: mobility issues in the neighbourhood. For several months, the community has been engaged in a series of activities to reflect on street design. This evening, they are giving their opinion on design scenarios to promote walking and cycling. The chosen scenarios will launch a green neighbourhood plan that the municipal administration will implement during the next years.

This is an example of a type of action undertaken by the Montréal Urban Ecology Centre (MUEC) to promote the development of a culture of participatory urban planning. The MUEC was inspired by the process put forward by Community Planning and the work of architect Jan Gehl and activist author Jane Jacobs for their vision of the city. The process outlined here emphasizes the importance of citizen participation in creating more human living spaces that meet public needs.

The participatory planning process has inspired and continues to inspire communities across Canada.

Tools to promote involvement

Participatory urban planning has a strong potential to transform the city and its neighbourhoods. However, it must be well planned if it is to be successful. This guidebook lays out the general aspects of the process developed by the MUEC. Its goal is to equip stakeholders and citizens by providing them with an overview of the steps to take and the players to include. The guidebook also presents the available tools and resources.

The rest is in your hands. The time has come to invite citizens to define the future of their neighbourhood!

Citizens discuss design scenarios in Plateau-Est

1.

WHY PARTICIPATORY URBAN PLANNING?
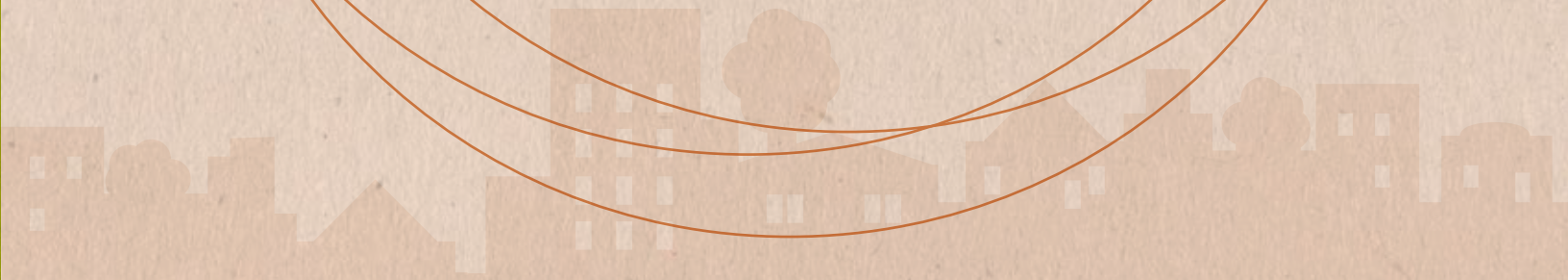
The value added by a participatory approach

Participatory planning is a proven approach to designing neighbourhoods on a human scale. It provides undeniable advantages when compared to conventional processes managed solely by professionals. Since citizens are in the neighbourhood every day, they can provide observations and knowledge that are different from experts, thereby enriching the analysis. Professionals can then supplement the information provided by the citizens. Listening and being open to everyone's input are key ingredients for the mutual understanding of issues.

By integrating citizens' observations, concerns and aspirations from the start, and throughout the project, all participants can find solutions collectively that meet the community's true needs. More than just a simple consultation, participatory urban planning promotes open dialogue and interaction between users, experts and decision makers throughout the entire process.

Examples of projects that can benefit from a participatory approach

- Neighbourhood sustainable mobility plan
- Redevelopment of a former industrial sector
- Design of a public space
- Greening of the grounds of a housing complex
- Construction of a community centre

Experts in the problems and needs

COMBINING KNOWLEDGE

Experts in urban planning and technical solutions

CITIZENS
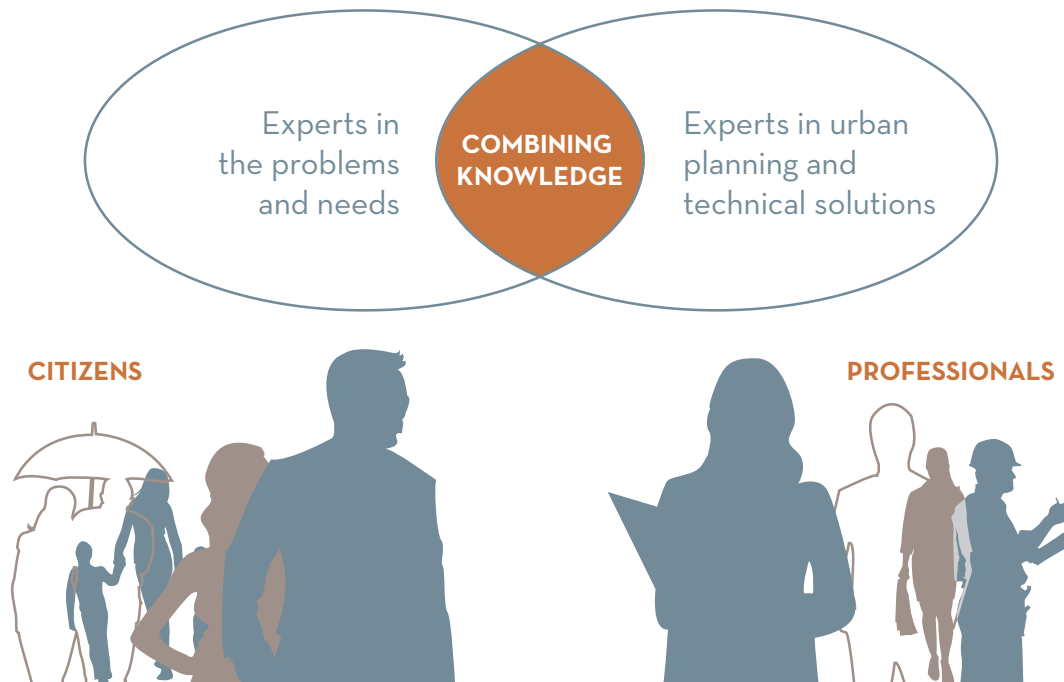
PROFESSIONALS

The benefits of citizen participation

Citizen participation can:

- Supplement the technical knowledge of urban design professionals by informing them about day-to-day use of an area;

- Prioritize needs and target specific locations;

- Improve analysis and proposals to ensure that results better reflect real needs;

- Form alliances with community leaders;

- Promote the social acceptability of a project and its adoption by the community;

- Understand the time, budget and technical constraints of the various partners;

- Promote democratic governance and support active citizenship;

- Ensure the spirit of the project is maintained in the long term through the participation of active citizens and partnerships with local organizations.

Participatory urban planning is urban planning that has no true project or solution before the public debate, but does after the public debate.[1]

1   [translation], CHALAS, 2009.

Citizen contributions to city planning: enriching and diverse

Citizen contributions are the central element to the participatory planning process, and they can manifest in various ways. Three major categories of knowledge are required to ensure each project is a success.

1. USER KNOWLEDGE

As users of public space, citizens bring their experience of an area, their understanding of the problems, and their observations about possible improvements. They help legitimize the entire process.

2. TECHNICAL KNOWLEDGE

Some citizens with technical knowledge can play an important role when they become involved in a project. Their knowledge can act as a counterweight to arguments of specialists. Through their involvement, the citizens are also able to develop a collective expertise. For example, some become experts in matters related to traffic, others in urban design.

3. ACTIVIST KNOWLEDGE

This kind of knowledge refers to the political skills of some individuals, committees or organizations who are involved. These stakeholders excel at speaking out to communicate their ideas and engage their fellow citizens. Their capacity to engage decision makers mean they are important change makers.

Source: NEZ, 2011.

Two inspiring examples *from other countries*

Credit: Patrice Godin

Gansevoort Plaza after the redesign.

Gansevoort Plaza: when New Yorkers re-appropriate a public space

In New York City's Meatpacking District, the non-profit Project for Public Spaces joined with residents, elected officials, business people and community leaders to plan the redesign of Gansevoort Plaza, a vast open space at the corner of 9th Avenue and Gansevoort Street. The neighbourhood's popularity had led to a chaotic influx of automobile traffic, making it hazardous for pedestrians. Following the input of citizens, traffic analyses and lively collaboration among the different parties involved, a true public place was created. It significantly increased quality of life and promoted human-scaled interaction.

Source: Project for Public Spaces, 2005

Credit: Gehl Architects

Participatory exercise in the Share an Idea campaign.

Imagine a new Christchurch

Devastated by a violent earthquake in 2011, the City of Christchurch, New Zealand, called on Danish firm Gehl Architects to help them rethink a new downtown. Specializing in participatory urban planning, the Gehl Architects team collaborated with municipal officials to launch the "Share an Idea" campaign, an invitation to residents to express their ideas about future development. An impressive total of 106,000 proposals were collected, from which overall goals were developed. From the start, the city council showed a clear will to accept the input of citizens and involve them throughout the process. Now in the implementation phase, the redevelopment of Christchurch is not a reflection of just a handful of experts and elected officials, but the result of a common vision of its citizens.

Source: Gehl Architects, 2011

Some spinoffs of participatory urban planning processes

Whether a complete process spread over several months or a single participatory activity to improve a project, the participatory urban planning initiatives led or supported by the MUEC have created numerous spinoffs. Here are a few examples.

Credit: Ville de Plessisville

Citizen workshop

Participation of seniors in Plessisville

As part of *Municipalité amie des aînés* (MADA, or Senior-Friendly City), the Municipality of Plessisville, together with civil society stakeholders, held an exploratory walk and a citizen workshop with seniors. The goal was to learn more about their destinations and problems related to active transportation in the town centre.

The Plessisville experience proved to be very positive for the town councillor responsible for MADA. In addition to collecting useful information on specific areas downtown and identifying implementation priorities and possible actions, she was able to confirm the advantages of citizen participation:

"Citizen activities like this one are really constructive because we hear different people's points of view. As elected officials, we can take what they say and put it into action. In my opinion, that's how you take care of your constituents. That is citizen participation. If we consulted more often, there would be less grousing," says Yolande Saint-Amant, councillor for the Parc Industriel district.

A citizen sustainable mobility plan in the Saint-Sauveur neighbourhood in Québec City

In 2011, the *Comité des citoyens et citoyennes du quartier Saint-Sauveur* (CCCQSS, Saint-Sauveur neighbourhood citizens' committee), in collaboration with the Saint-Sauveur neighbourhood council, developed a neighbourhood sustainable mobility plan. The goal of the process was to identify, with citizens and local stakeholders, actions to promote active and public transportation. After creating a diagnostic portrait, the committee organized four activities to explore solutions. One of them involved urban design professionals, the other three involved neighbourhood citizens.

The professionals developed innovative solutions for certain sites identified as priorities in the portrait and evaluated their strengths and limitations. According to Éric Martin, community facilitator for the committee, "The professional workshop allowed us to bring in key people, including a professional from the Québec department of transportation, a representative of the City, a representative from the merchant's association, a public health officer, and a city councillor. It was the first time that the committee was able to get an elected official to an urban design workshop."

The solutions developed by the professionals were presented during the activities with citizens. Project leaders were able to measure the support of participants and collect comments and suggestions. "The citizen participation tools provided structure for the conversations so that people were focused on the solutions, and there was no confrontation. About 70 people took part in the process and are proud of it now. Citizens are stakeholders in the solutions. That's the most important thing," says Mr. Martin.

Materials used during the citizen workshop.

Results of the visioning exercise done during the citizen workshop.

Spurring citizen involvement at Habitations Émile-Nelligan II

In 2010, residents of Habitations Émile-Nelligan II, a social housing project in Montréal, worked with the MUEC and the Montréal municipal housing board to green the backyard of their building. The project was designed to reduce the heat island effect and transform an asphalted space into a small urban oasis.

Residents said they would use the yard more if it were more inviting, greener, and provided a bit of privacy. The MUEC suggested a participatory process to create a landscape design that would respond to their hopes and needs.

Following an information session, a design workshop and a design scenario validation workshop were held with the residents. Then a plan was developed and implemented by removing 2,500 square feet of asphalt and replacing it with shrubs and fruit trees. The asphalted space was transformed into an area where residents can relax and socialize.

The project culminated in an official inauguration and visit of the site. The event was marked by a moving testimony by a resident who said that Montrealers are surrounded by asphalt and concrete and that green spaces can have a major impact on their daily life by improving their immediate environment.

Backyard of Habitations Émile-Nelligan II before and after the redesign.
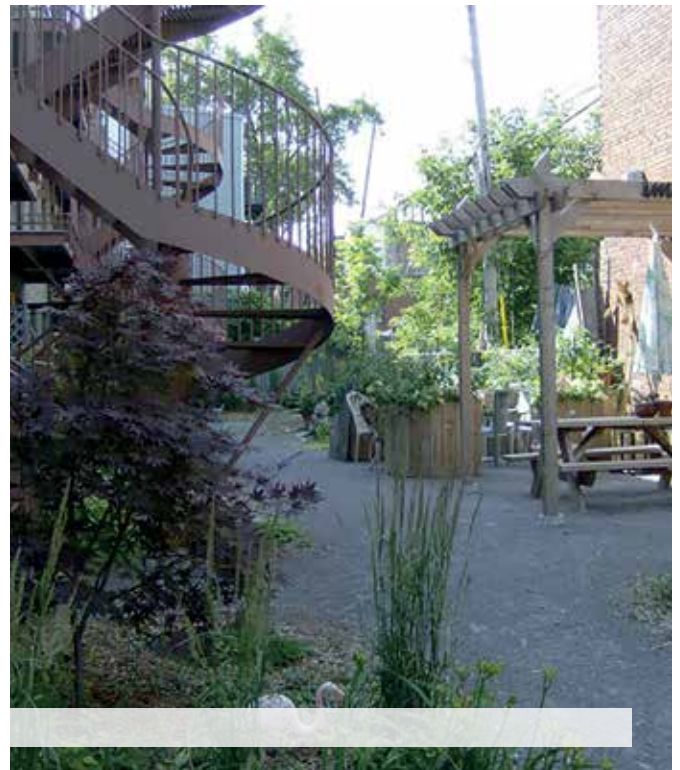
A Montréal-style *woonerf*

In Montréal's Saint-Henri neighbourhood, a wide asphalted alley stood where the Saint-Pierre River once flowed, with no defined use except to cover a wastewater collector. More than 600 metres long, the destructured space was used for illegal parking, dumping garbage and as an unofficial traffic short-cut. Even worse, it was also a major urban heat island. In 2010, the Southwest Borough of Montréal invited its citizens to be part of its revitalization. Thanks to intensive green landscaping and traffic calming measures, the site became the first woonerf in Montréal.

In Dutch, the term woonerf is used to designate a "lively residential street" designed for everyone. Motorists drive alongside pedestrians, cyclists, and children playing.

In collaboration with the MUEC, site visits and public meetings were organized to improve the design proposals. Thanks to citizens, numerous improvements were made, such as reduced vehicle speeds, increased space for unstructured activities, materials to reduce the heat island effect, lighting, and universally accessible street furniture. The final design offers spaces for relaxation, play and gardening, while maintaining vehicle access to homes. Now

the site contains 7,000 square metres of greenery, one hundred trees and 1,800 shrubs.

In addition to improving residents' quality of life, the woonerf has created several unexpected benefits, including improved urban safety thanks to site use and activity. It has also inspired developers of new construction projects around the woonerf to green their properties. The project has won many regional and national prizes and received recognition for its innovative traffic calming measures and contributions to improving public health.

Inspired by this success, the Borough has begun another participatory process with Table de Concertation Action-Gardien, a local community round table, to create a second woonerf in the Pointe-Saint-Charles neighbourhood. "The MUEC's participatory process made such a difference, both for our folks and our professionals, that this is the example I use to extol the virtues of citizen participation in urban planning," explained Benoit Dorais, mayor of the Southwest Borough and leader of the second opposition party at Montréal's City Hall.

Credit: Arrondissement Le Sud-Ouest, Montréal

The woonerf site before and after the redesign.

2.

*KEYS TO
SUCCESSFUL
PARTICIPATION*

Aim for the appropriate level of participation

The purpose of citizen participation in urban planning projects is to develop an understanding of common goals for the betterment of the community. Participation should foster the exchanging of ideas and developing new ones. It should lead to innovative solutions and knowledge sharing.

In a participatory planning process, proposed activities should allow citizens to have a real influence on the ideas developed and decisions to be made. Promoting citizen participation means more than providing information and collecting feedback. Citizens need several opportunities to participate during a project, through activities that entail varying levels of participation. Information and consultation sessions are part of these activities but they are not enough.

This does not mean that everyone has to be involved all the time. Each phase in a project's development calls for a specific form of participation to take into account the ideas of each stakeholder and ensure the process is effective. For example, when a project begins, citizens and local stakeholders are invited to develop the project vision collectively. Urban planning professionals are responsible for developing design scenarios based on the suggestions made during the citizen participation activities. Citizens are then informed of the proposed design scenarios and invited to assess them.

Including without excluding

The desire to include citizens in urban planning decisions should not exclude certain groups from the neighbourhood. Urban planning projects that address sensitive issues such as the protection of minorities and vulnerable populations (e.g., creation of a supervised injection site) should be submitted for consultation with care.

PARTICIPATION LADDER

LEVEL OF PARTICIPATION AND INFLUENCE

5 Decide together, partner
e.g., referendum, co-management of a site

4 Engage, negotiate
e.g., citizen advisory committee

3 Discuss
e.g., workshop

2 Consult, gather information
e.g., online survey

1 Inform, educate
e.g., information session

Source: Health Canada, 2000

Know how to mobilize: the importance of spreading the word

Participatory urban planning involves participation. Your project will not have any impact unless you can mobilize citizens and local stakeholders to successfully carry it through. Mobilization is an essential aspect of the success of a participatory process, but it requires a structured approach and well-directed efforts.

Here is some practical advice:

- Draw up a list of interested people at each activity;
- Contact community leaders, networks, organizations, institutions and citizens' committees already present in the area, as well as local elected officials;
- Announce activities in advance (at least three weeks' notice is recommended);

- Use a variety of publicity mechanisms: social media, traditional media, posters in busy places, coverage in local newspapers, web sites, flyers, etc.;
- Post signs at the project site;
- Go out to meet people where they are and speak to them directly, e.g., during neighbourhood festivals or at popular gathering places.

General principles to adopt and adapt

The challenges of citizen participation are well known: mobilizing citizens and stakeholders, dealing with opposition to the project, reconciling divergent positions, reflecting proposed ideas in the final decisions, and so on. These challenges can be overcome through a well-planned process.

Here are some principles that can guide your participatory planning process and lead to success:

1. Define clear, measurable and realistic goals: Identify the desired results to develop appropriate activities.

2. Agree on the rules and boundaries: Make the process clear and transparent and be open about constraints.

3. Avoid technical jargon: Use plain language in communications, technical documents and during activities.

4. Work at the human scale: Emphasize working in small groups and at the neighbourhood scale so that everyone is comfortable and heard.

5. Document the process: Record what is being said and take pictures.

6. Adapt the process: Avoid rigid models and modify the process as you go along, when needed.

7. Vary the methods according to the target group: Use a variety of tools and methods adapted to a variety of people.

8. Call on experienced facilitators: Promote everyone's participation through well-directed facilitation.

9. Illustrate ideas: Use visual presentations to facilitate understanding of ideas and concepts.

10. Involve groups with different interests: Reach out to major stakeholders as soon as possible to avoid potential resistance.

11. Provide the necessary resources: Allocate the time and resources needed for the scale of the project.

12. Emphasize quality when preparing activities: Use a few, well-planned activities to collect highly significant data.

13. Learn from the experience of others: Get ideas from what has been done elsewhere. Do not try to reinvent the wheel.

14. Go on-site: Facilitate the understanding of concepts and develop well-adapted solutions by working at, or near, the project site.

Source: Wates, 2008

3.

The six phases

OF PARTICIPATORY URBAN PLANNING

Participatory urban planning: how to do it

MUEC projects and similar work done in Canada and elsewhere in the world have demonstrated the importance of a roadmap in making a participatory planning exercise a success. Over the years, the six-phase process developed by the MUEC has proved to be effective in transforming living spaces with and for citizens. Its application in many different communities in Canada, supported by the MUEC and its partners, has produced convincing results.

Participatory Urban Planning Process

1. LAUNCH
Establish a partnership with local stakeholders and define the action plan.

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Jointly established partnership agreement

Stakeholder mapping

2. UNDERSTAND
Create a diagnostic portrait of the use of public space.

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Exploratory walk

Consultation kiosk

Survey

3. EXPLORE
Identify design scenarios that will meet the needs and resolve issues.

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Professional workshop

Youth workshop

4. DECIDE
With the different stakeholders, validate and improve the solutions developed.

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Scenario validation workshop

Work session with municipal professionals

5. ACT
Implement the design solutions and offer public commitments.

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Planting event

Pilot project or temporary measures

Creation of a monitoring committee

6. INAUGURATE
Celebrate the project's accomplishments with a mobilizing event.

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Launch party

Press conference

Site visits

CONTINUOUSLY EVALUATE THE PROCESS AND RESULTS
Questionnaire, Participatory evaluation activity, Annual review

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A flexible process

Far from being a rigid model, the MUEC's approach is, above all, a frame of reference that can be adapted to any context. The type and scale of the project, available resources, schedule, and existing data should be taken into account for planning a participatory process that is appropriate to the specific project.

The intensity attributed to each phase and the number and nature of activities proposed can vary based on the goals or the available time. Even though the phases of the participatory process have a logical order, they can be approached independently. For example, you may want to explore design ideas with citizens to resolve previously identified problems to convince your municipality to take action. In this case, you could complete just one or two of the six phases.

Some phases can overlap in time. For example, if your schedule requires it, or if you want to keep public momentum, you can start exploring design solutions even if the portrait has not been officially validated.

The same stakeholders may be called upon during different phases, but with different roles or levels of involvement. For example, municipal professionals will be actively engaged in developing design scenarios, while they will play more of a listening role when the scenarios are assessed and prioritized.

Several participatory tools and activities for carrying out each phase are provided. Some can be used to collect similar types of information, but with differing levels of detail. You can choose which ones to use based on your goals and available resources.

The six phases of the participatory process are presented as follows to facilitate understanding:

- **What ?** Description

- **Why ?** Goals

- **Who ?** Stakeholders

- **How ?** Methods and tools[2]

- **Examples of participatory activities**

- **Additional information** tips, pitfalls to avoid, things to keep in mind, etc.

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2   Details of most activities presented here are available (in French) in the toolbox titled "Transformer sa ville" on the MUEC Web site: www.ecologieurbaine.net.

Phase **1. LAUNCH** the project

What ?

To carry out a participatory planning project, it is important to identify and involve local stakeholders from the start and establish partnerships. By calling on community leaders, you will help establish relationships with other stakeholders in the area. It is very useful to mobilize the people responsible for making decisions regarding the physical transformation of the community (e.g., municipal elected officials and housing project managers). Other partners could include people interested in the project and those who can mobilize the community. Experience has shown the importance of creating formal partnerships with these stakeholders by creating a working committee, which will establish an operating framework for a project. This framework should foster open communication between all groups who play a role in the area.

Create a working committee

Creating a working committee that represents the area and brings together key stakeholders will be decisive for completing the project. The working committee has the following mandate:

- Identify limitations that projects must work within;
- Mobilize resources;
- Mobilize the community;
- Provide technical support;
- Identify and collect existing information.

A work team (3 to 5 people), drawn from this committee, is designated to manage and run the project. This smaller group defines the general aspects of the project, plans and implements the participatory urban planning process and mediates among members if there is a conflict. The other members of the committee form a larger circle of contributors not necessarily involved in all planning aspects.

Managing the process

Specific guidelines are necessary to ensure things move smoothly and the participatory planning initiative is successful. To establish an appropriate operating framework, the following elements are necessary:

- Define the project area;
- Determine goals, targets and monitoring indicators;
- Clearly identify the stakeholders;
- Clarify everyone's roles and responsibilities;
- Establish a schedule;
- Calculate available financial, human and material resources.

Within the framework adapted to the project, actions are taken to ensure that a collective vision for the future of the neighbourhood or target site emerges.

Practical tips

A planning schedule is a good way to have an overall idea of the process in the beginning. As time goes by, adjustments can be made to activities (choice, number, timing, etc.). Activities should be planned two to three months in advance.

Remember

The time needed for the project launch phase is often underestimated. It is essential to allocate the time required to create a strong partnership, one which can evolve and respond to project developments.

Why ❓

To establish project foundations through a solid partnership

Collaboration is essential to the success and sustainability of any participatory process. The process should not rest on the shoulders of just one stakeholder.

- The launch phase is where we determine how each stakeholder will contribute and the ground rules for managing a participatory process.

- Decision makers (such as municipal elected officials and professionals and housing project managers) are responsible for implementing changes to the built environment in the medium and long term. Consequently, it is essential to work in partnership with stakeholders that will later make the changes happen.

- Mobilizing citizens requires a great deal of time and effort. It is important to create links with local organizations and citizen leaders of the community who have direct links with citizens and goals that are compatible with those of the project.
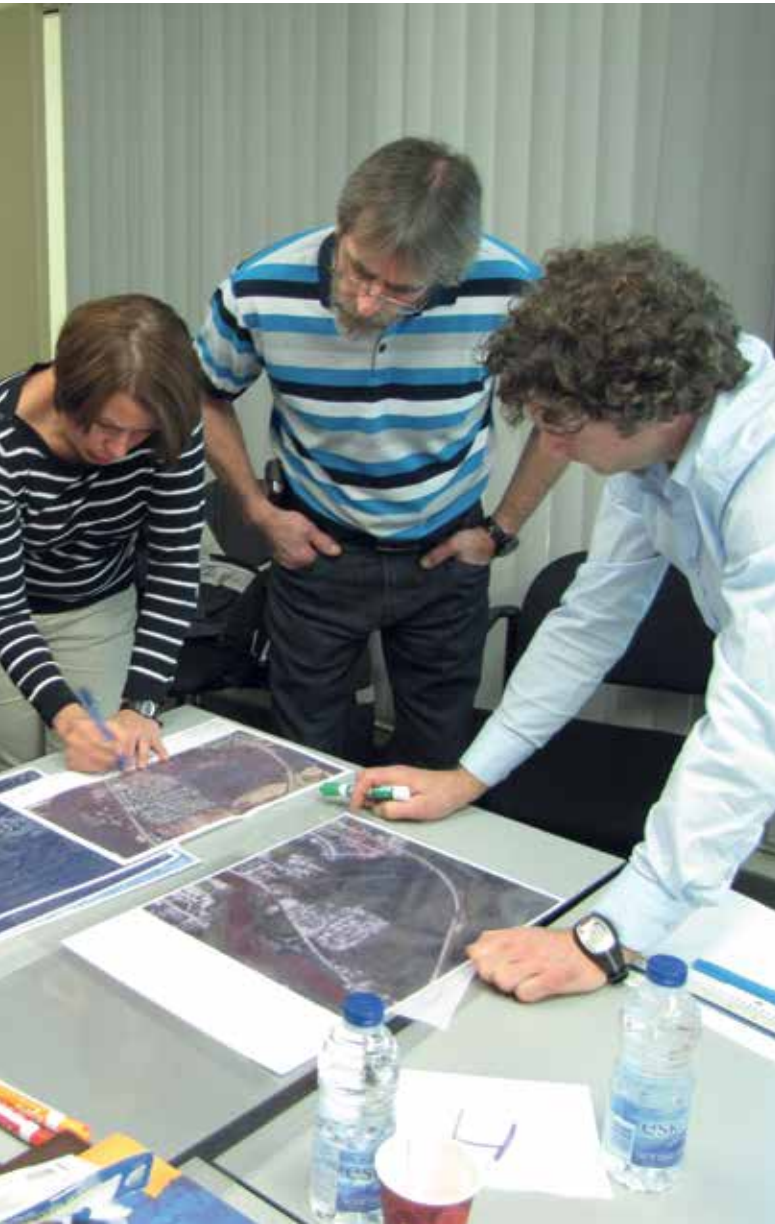
Who ❓

Bring together the appropriate partners

Create a committee of key people, in light of the project context:

- Committed and expert citizens;
- Municipal elected officials and professionals;
- Members of community networks;
- Representatives of schools, universities and public health.

How ❓

Some activities for identifying and rallying partners:

- Establish a partnership agreement;
- Force field[3];
- Stakeholder mapping;
- Define the vision for the project area.

Remember

Two key elements of successful participatory urban planning project are:

1. Allocate the budget, human and material resources needed;

2. Respect the work pace of local and community partners and other stakeholders.

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3   The force field activity is designed to understand the factors that contribute to a problem, a situation or a project and those that counteract it. Source: Chevalier, Buckles and Bourassa, 2013.

Example 1
A neighbourhood vision in Southeastern Notre-Dame-de-Grâce

At the beginning of the Southeastern Notre-Dame-de-Grâce (NDG) Green, Active, and Healthy Neighbourhood project in Montréal, about 30 citizens and local stakeholders met to define their vision for the neighbourhood. Their goal was to look into the future toward a collective ideal to strive for.

During the kick-off public meeting, participants carried out a "flower" exercise. They were invited to identify three elements that give them a sense of belonging to the neighbourhood (the roots of the flower) and to imagine three things that they would like to see change (the petals). The answers were then presented at a plenary meeting at the end.

Based on the participant's suggestions, the project leaders drafted a neighbourhood vision statement and used a visual to illustrate the principal ideas. The vision statement was assessed by the residents during a later activity. The shared vision guided the reflection and proposals during the entire project.

Key points of the vision for Southeastern NDG

- Greater social diversity
- Resident participation
- Public green spaces

- Neighbourhood life
- Affordable rent
- Architecture

Remember

A visioning exercise is a simple activity that reinforces a sense of belonging to the neighbourhood and the project.

The vision statement also serves to remind project leaders of the local colour.

A diversity of citizens and stakeholders is necessary to ensure that the community is well represented.

The vision statement should be evaluated after a few years and, if necessary, revised.

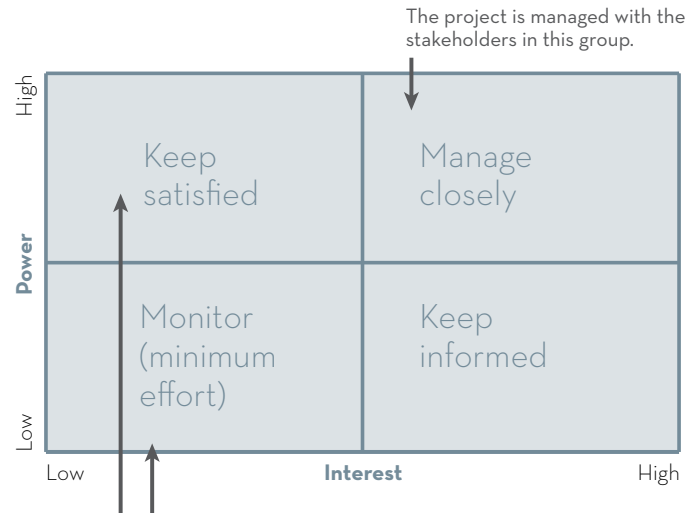*Southeastern NDG citizens define their vision of a Green Neighbourhood.*

Example 2
Stakeholder mapping in Chomedey

The urban planning committee for the integrated urban revitalization of Chomedey (RUI Committee), the City of Laval and the MUEC led a participatory urban planning project in Laval. At the beginning of the project, the committee wanted to understand the stakeholder profile and identify potential partners to include in the process. A stakeholder mapping exercise was done for this purpose.

Stakeholder mapping consists of evaluating the degree of interest and the influence of stakeholders relevant to the project. It can be used to determine what type of relationship should be developed with each stakeholder and at what point of the project to involve them.

A list of stakeholders in the area was developed, and their relevance to the project was evaluated. All of the stakeholders were located in a matrix to estimate the type and intensity of the relationships to establish with them during the project.

Stakeholder		
Goal		
Position regarding project		
Power		
Interest		
When to involve them		
Strategy		
Other		

The project is managed with the stakeholders in this group.

	Interest Low	Interest High
Power High	Keep satisfied	Manage closely
Power Low	Monitor (minimum effort)	Keep informed

Strengthening the relationships with these stakeholders can move them into the "Manage closely" group.

In summary, stakeholder mapping is used to:

• Confirm or correct a perception regarding a stakeholder;

• Identify possible alliances and potential obstacles to participation;

• Adopt a specific approach for every stakeholder to optimize their participation.

Remember

Since some information is confidential, do not distribute this document.

The position of stakeholders may change over time: the map should be revised for each phase.

Phase **2.** **UNDERSTAND** the issues

What ?

Now that the project has been launched, the time has come to create a diagnostic portrait of the project area. Its purpose is to highlight the key issues and list findings that can be used to guide design solutions. During this phase, the contributions of citizens, civil society groups and urban professionals are used to collect various kinds of information and establish a reliable portrait.

Data collection

In most cases, existing data constitute an excellent basis for understanding the neighbourhood. The first step is to research, collect and organize the information so that it can be of use to the project. It may be socio-demographic data and other types of statistics previously collected by different stakeholders, or studies and plans completed during the last few years.

It is necessary, however, to collect data specific to project issues to supplement existing information. Collection methods may take the form of field studies (see box) or participatory activities bringing together citizens, representatives of community organizations and local professionals. Their observations and anecdotes as users of the area are collected.

Quantitative data are necessary to compare sites, problems and scenarios objectively. They are particularly useful to convince people who prefer to trust "the numbers." Qualitative information can enrich the data, especially on diversity of uses and points of view. The combination of both types of information allows you to build solid and balanced arguments.

Understand the use of public space through field studies

Primarily quantitative data collected through field studies are used to support the findings and requests expressed during the participatory activities. During field studies, you will observe, count, compile and document to assess preliminary findings and supplement the qualitative data.

Here are some examples of actions done as part of a field study:

- Pedestrian and cyclist count
- Profile of public space users
- Audit of pedestrian potential
- Evaluation of greening potential

For more informatoin, check out the MUEC's online toolbox 🧰 Transformer sa ville : www.ecologieurbaine.net

Why ?

- To promote a common understanding of the issues in the project area;

- To create documents that are accessible for everyone and record and organize findings about the project area (e.g., diagnostic portrait, public presentations, photos and videos);

- To identify priority actions and key places to guide the development of appropriate solutions.

Who ?

- Project area citizens;

- Local community groups representing the entire community;

- Representatives of schools and public health;

- Store owners and other economic stakeholders;

- Professionals from various spheres (urban planning, transportation, urban design, landscape architecture, sports and leisure, social development, etc.) who are with the municipality or a public agency and have the power to intervene in the area;

- Municipal elected officials, whose understanding of the issues and citizens' needs is essential.

Participatory activities may be limited to certain groups when focused on a particular issue or place (e.g., an exploratory walk with seniors or youth activities).

How ?

Here are the recommended steps for guiding your actions in the *Understand* phase. The importance given to each step can vary with the context, but the order should be followed.

1	**Observe**	What do you see in the field?
		What are the preliminary findings?
		Who are the players and what are their perceptions?
2	**Consult the literature**	What information already exists?
3	**Identify missing information**	What information is missing regarding the use of the project area?
		Can some findings be supported by existing data?
4	**Find missing information**	aWhat activities or studies could you use to find this information?
5	**Analyze and refine your understanding**	What findings have you established from the collected data?
6	**Establish priorities**	What issues or project sites are priorities?
7	**Make the portrait come to life**	What are the different ways to communicate that data and findings of the diagnostic portrait to implement proposals?

Practical tips

To avoid repeating work, contact other local stakeholders to see if they have created portraits for the same project area that may be useful for you.

You can take advantage of participatory activities to collect a list of potential participants for later phases.

Example 1
Consultation kiosk in Southeastern Notre-Dame-de-Grâce

The Southeastern Notre-Dame-de-Grâce Green, Active and Healthy Neighbourhood project was begun in 2010 by Mobiligo and the MUEC. They took advantage of the many summer activities in the neighbourhood (end of primary school celebrations, Urban Arts Festival, Italian community celebration, etc.) to hold kiosks to inform citizens about the process, create a list of interested people, and target areas of interest and problematic spaces. Approximately 140 people were consulted during these events.

Participants were invited to mark on a large map of the project area places and spaces that they liked (with green dots) and those they disliked (red dots).

Citizens discussing issues related to active transportation in Southeastern NDG.

Photo-booth of the Longueuil housing board

Practical tips

To add a bit of fun and collect visual materials to document the project, you can include a photo-booth with your kiosk. It is quite simple: people write a statement or their answer to a question on a board in the form of a speech bubble, and then they hold it up like in a comic strip and have their picture taken.

Examples of questions asked at the NDG kiosk:

- In your trips on foot or by bicycle, what place do you avoid in the neighbourhood? Why?
- Name a feature in your ideal or dream Green Neighbourhood.

Example 2
Exploratory walks in Bridgeland, Calgary

As part of the Active Neighbourhoods Canada project, the Sustainable Calgary Society (SCS) organized a series of exploratory walks in the Bridgeland neighbourhood in Calgary. SCS wanted to understand how pedestrians use the neighbourhood and how they feel in response to certain developments.

An exploratory walk is a field observation method done by a small group. It is designed to identify characteristics than can limit the mobility of individuals or generate safety concerns. It also can identify positive aspects of the target area. The data collected are qualitative, i.e., participant testimonies and observations.

Credit: Sustainable Calgary Society

Participants of an exploratory walk discuss the built environment.

The participants should live in or spend time in the area (residents, workers, etc.). The group can be mixed or composed exclusively of one particular group (e.g., women, people with reduced mobility).

Prior to each walk, SCS established a route on which the elements of the built environment to be analyzed were identified. It also prepared an observation checklist for noting comments during the walk.

At the start of the walk, SCS went over the goals and instructions with participants. During the walk, participants briefly discussed points of interest and problems. One person was designated to take photos to illustrate the information collected. After the walk, participants discussed the major difficulties and positive aspects that they observed. Project leaders collected all the comments, which were later used in the neighbourhood portrait.

Practical tips

Form groups of six to eight people.

Invite elected officials and planning professionals to help implementation happen in the future.

If weather is bad, reduce the number of stops and amount of information to record.

Plan for a sheltered area for discussion periods. Providing food is always a plus!

Limit the length of the walk to 90 minutes.

Phase 3. EXPLORE solutions

What ?

The Exploration phase is based on the observations and findings of the *Understanding* phase. During Exploration, the range of design options are presented and evaluated prior to decision-making.

In this phase, acceptance, co-operation, diverse points of view, and creativity are a must to obtain the best results. Professionals, citizens, community workers, merchants and elected officials are invited to suggest ideas and discuss different possible approaches.

Proposals inspired by best practices

No approach should be excluded when searching for specific solutions for each project. It is a good idea to look at local, national and international initiatives that have proven successful in similar contexts. Participatory urban planning has made remarkable progress during the last decade and many examples can serve as references.

Why ?

- To bring together all stakeholders to imagine the best solutions to the identified problems;
- To develop innovative ideas inspired by best practices;
- To develop a collective work dynamic among people who are often not used to working together.

Who ?

- Professionals working in the project area: Typically those connected to urban planning, transportation, architecture, urban design and landscape architecture. They have specialized understanding of the area and its characteristics.

- Professionals without much familiarity with the project area: They can provide a new outlook and possible design solutions.

- Citizen experts: They already have in-the-field knowledge and an informed approach to the area and process.

- Merchant group representatives: These stakeholders have a unique perspective that must be taken into account.

- School and community professionals: They are important to the social fabric of most neighbourhoods.

- Elementary and high school students: These users are particularly affected by questions of safety and can provide innovative perspectives.

How ?

- Workshops with groups of informed and active citizens
- Workshop sessions with professionals
- Workshops with elementary and high school students

Example 1
Youth workshop on the redesign of an area around a subway station

The MUEC organized a youth workshop for the project to redesign the area around the Beaubien subway station in Montréal's Rosemont—La Petite-Patrie neighbourhood. Fourteen students from La Mennais elementary school were consulted on the configuration of Beaubien Street, which many of them use to get to school.

During the exploratory walk, the children observed the built environment using their senses. They showed their reaction to places with green balloons (*I like*) and red balloons (*I don't like*). The children were frank and labelled Beaubien Street as dirty, smelling of gasoline and urine, with few trees, sidewalks that are too narrow, and motorists who don't let people cross the street. But the street could still be considered pleasant "since there are lots of activities, a lot of life and the buildings are colourful."

Using their diagnosis, the children worked on design solutions. Pretending to be urban planners, they drew improvements on photos taken during their walk, showing how they would correct the problems observed.

Their solutions were both simple and inspiring: colourful paint and climbing plants to brighten concrete structures, more trees, wider sidewalks, more visible pedestrian crosswalks, space set aside on the street for musicians, and more garbage cans. The children's ideas were presented to Borough professionals. Even if they did not fit within the project's budgetary or regulatory framework, these proposals undoubtedly enriched the adults' ideas.

Students from La Mennais school during the exploratory walk.

Students exploring solutions in a workshop.

Example 2
Design workshop for a green project in Longueuil

As part of a project to counter the urban heat island effect, residents of Habitations Bienville in Longueuil were invited to imagine a new design for the interior courtyard of their social housing buildings. More than 40 residents of all ages participated in the design workshop.

The design workshop called on the creativity and commitment of residents. They were invited to decide collectively on the location of the main activity spaces to be designed and to illustrate on a map the design elements that they wanted for each space.

After a presentation of examples of inspiring designs, residents formed small work groups to discuss the yard redesign. They made choices and indicated on a plan what spaces would be used for children's play and relaxation. They shared and illustrated their ideas on greening the yard, the buildings' walls and the parking lot.

Back as a group, the participants quickly arrived at a consensus on the designs to keep. Many residents expressed their satisfaction with having been consulted and their confidence that the professional team would create a landscape plan that would reflect their ideas.

"The design workshop is a time to be creative— something we rarely get to do in daily life. Opportunities to decide and debate as a group are also rare. It's important to find ways to inspire participants"

- Facilitator of the Vert chez nous project

Some examples of questions to stimulate discussion:

- What activities would you like to do outdoors?
- Where should there be shade?
- How can we have everyone take advantage of outdoor spaces?
- How should space be beautified so you can be proud of your living environment?

Residents reinvent the interior courtyard of their buildings.

Phase **4**. **DECIDE** on scenarios

What ?

You have identified the most promising solution for improving the urban environment of your project area, and it is now time to make some decisions. This phase involves soliciting input from citizens and all parties directly and indirectly involved in the process.

Explain and bring people together

This step assesses the social acceptability of the project and seeks an equitable equilibrium among the different stakeholders' often diverging points of view. It is probably an illusion to think that a perfect consensus can be obtained. However, it is always possible, with clear communication and real co-operation work, to bring parties closer together and arrive at a common position that satisfies everyone.

During this phase of the process, it is a good idea to go beyond the relatively small circle of people already participating. Many citizens and stakeholders are not as aware of urban design issues, but it is important to consult them as well. These people have something to say because they also experience the same space on a daily basis. Additional effort is necessary to promote activities in order to get them involved.

The proposed solutions must be explained simply and clearly, so they can be easily understood. This way, everyone will be fully informed and have the information required to express their acceptance of the solutions. Citizens should also be encouraged to suggest adjustments and improvements to the solutions. At the end of the exercise, this will increase the chances that the accepted solutions faithfully reflect the needs of all residents.

Define the action plan

It is up to the work committee to structure the accepted proposals into a detailed action plan. The action plan addresses the various issues and problems that were identified. It must provide specific solutions for each situation that needs to be corrected. In brief, the action plan translates the words into actions.

Remember

It is important to validate a draft of the plan with the major project partners, including the decision makers, who will be the ones to implement the plan and ultimately make the final decisions. This ensures that the plan is realistic, accurately reflects the previous steps, and that the efforts required for the design projects will be accepted.

Why ❓

- Validate the priority issues and sites with citizens and stakeholders.
- Assess their acceptance of the solutions that resulted from the exploration phase, and collect any new ideas.
- Decide on the best actions to take in everyone's interests and collect these measures in a well-structured action plan.

Who ❓

- Decision makers
- Citizens
- Stakeholders that are project partners
- Other local stakeholders, e.g., those from schools and community groups

How ❓

- Scenario validation workshop
- Mediation workshop
- Work session with groups of informed and mobilized citizens
- Work session with municipal professionals
- Production of an illustrated action plan with specific and localized actions

Example 1
Scenario validation workshop for the Southeastern Notre-Dame-de-Grâce neighbourhood

In November 2010, citizens and stakeholders of the Southeastern Notre-Dame-de-Grâce neighbourhood were invited, during a consultation meeting, to give their opinions on the design scenarios developed to promote walking and cycling. The scenarios were designed to improve access to popular places, facilitate links between the northern and southern parts of the neighbourhood, expand the bicycle network and improve access to the Vendôme subway station. The scenarios were presented in the form of consultation kiosks.

> **A design scenario is an idea, concept or technical solution illustrated on a plan, a cross-sectional view of a street, a visual simulation or a model. To facilitate comprehension, the following are provided: a brief description, the strengths and limits of the proposal, the problems it seeks to resolve, and an estimate of the costs to complete it.**

Participants moved freely from one kiosk to another and could talk to the facilitators to get more details on the scenarios.

When they felt ready, they indicated their level of support for each scenario on an evaluation scale. They could also provide written comments about the different scenarios to specify what they liked and did not like.

Practical tips

Present the scenarios transparently: the strengths and weaknesses of each must be presented so that participants can compare them objectively.

Make the scenarios easy to understand: participants should be able to grasp the proposed measures and their impacts so they can take a position.

Train the kiosk facilitators: they should have a good grasp of the current situation and the proposals so they can answer participants' questions and help them choose.

A citizen writes her comments about a design scenario.

Street cross-sectional view. Design proposal for an underpass on Girouard Avenue.

Example 2
A participatory budget at Habitations Rosemont

As part of a project to redesign exterior spaces for Habitations Rosemont in Montréal, the MUEC tested a participatory budget process with residents to select the designs to be implemented.

A participatory budget is a participatory democratic process through which citizens decide how to spend budget funds.

During an initial activity, 26 residents of Habitations Rosemont reviewed different design concepts that a landscape architect had defined based on the ideas that they had submitted. The spaces to be redesigned were divided into four zones, and design options were suggested for each one. The options took into account the amount budgeted ($150,000), and the associated costs were presented to participants. Working in subgroups, the residents discussed the advantages and disadvantages of each option, keeping in mind the needs of various groups (children, families, etc.).

Thirty-four residents selected the designs that they preferred at a second meeting. With the help of a digital voting tool and hand-held clickers, they voted for a combination of their favourite designs, respecting the total budget available. The design proposals that received the most votes in each zone became the final choice.

Residents pointed out that the process removed some barriers between tenant groups, who generally mixed little with one another. During the activities, some seniors visited the community garage, which is usually only for families. Similarly, several families attended activities held in the seniors' tower. Mixed discussion groups held during the workshops encouraged residents to speak with each other.

Courtyard development proposal that was put to the vote.

Residents of Habitations Rosemont on the evening of the vote.

Phase **5**. **ACT** together

What ?

All project stakeholders are impatient to get to the implementation phase. It is the climax of their many participatory efforts to raise awareness, generate ideas, cooperate and plan. It is the time to take action in the field. Finally, the promising solutions have been identified, and implementing them is an inspiring, stimulating step.

The implementation of major projects is done gradually, until all users and stakeholders are satisfied with the final results. The Act phase can last from a few weeks to several years, depending on the complexity of the issues and the scale of the work to be done.

This phase may involve planting flowers or shrubs to begin greening a public place or implementing traffic calming measures. For traffic calming, it may be appropriate to start with a pilot project or temporary measures. Temporary measures are simple changes that are inexpensive, easy to implement and reversible, such as painting lines and installing giant flower pots or movable bollards. This tests the effectiveness of the implemented measures and increases their chance of being accepted by the public before significant investments are put into making permanent changes.

Ensure implementation is monitored

For projects where implementation is a long-term project (e.g., street redesign), a project monitoring structure should be put in place. This can be done by creating a monitoring committee made up of elected officials, municipal professionals, citizens, and other stakeholders from the participatory process. The committee will be mandated to establish an implementation plan to ensure that it advances and matches the proposals made during the planning process. The committee will also be responsible for communications related to the project. It should also develop mechanisms to collect user feedback in order to understand how citizens feel about the changes made.

Credit: Google Street View, 2012 and 2014.

Père-Marquette bicycle corridor in Québec City: Temporary trial design (photo 1) and permanent design (photo 2) of the intersection of Père-Marquette and Moncton.

Why ❓

- Transform the vision developed by all stakeholders of the different project phases into a reality
- Correct situations identified as problematic by participants.
- Try out temporary measures or pilot projects in the field to find out whether the proposed solutions meet the needs expressed by users and make corrections if necessary.

Remember

The participation of elected officials and municipal directors (or other responsible organizations) is important because they are the ones who will decide on allocating the human, financial and material resources necessary for implementation. This is also an opportunity for them to publicly commit to ensuring project follow-up and keeping citizens informed.

Who ❓

Different stakeholders are involved in project implementation depending on the type of project and setting. For greening projects, citizens can play an active role with project leaders to prepare the site and do the planting. This helps ensure that citizens take ownership of and maintain the new landscape design. Citizens can also be actively involved in projects in public places, e.g., the creation of a mural.

In the case of large-scale projects involving construction or major work (e.g., real estate development, modification of a street configuration, conversion of a public building) decision makers and urban planning professionals are responsible for implementation. It is up to them to establish, with project partners, the implementation plan, which includes the budget and schedule of completion. Making public commitments is a way to help maintain citizen mobilization.

How ❓

- Planting and caring for planted areas
- Public commitment by decision makers
- Creation of an implementation/monitoring committee
- Adoption of a resolution by city council confirming resource allocation
- Completion of pilot projects or temporary measures
- Permanent implementation of designs

Example 1
Planting and plant care workshop in Longueuil

The MUEC worked with Longueuil's municipal housing board to create urban cool islands at the Terrasse Georges-Jutras housing project, as part of the Vert chez nous project. Over a period of eight months, residents attended sessions covering information, consultation, idea-generation, and scenario assessment in order to define a landscape design plan. After all these steps, they were impatient to get their hands dirty!

Implementation of the plan began with a contractor performing the excavation and construction work and planting large plants. But it was the residents themselves who provided the final touch through a planting workshop.

Participants were briefly trained on the best ways to plant and maintain the planted areas. Then, using gloves and shovels, they prepared the beds and put the plants in the ground. This meant that a part of the project was a direct result of their labour. The children, who were given "certificates of participation," particularly enjoyed the activity.

Everyone got their hands dirty at Terrasse Georges-Jutras!

Practical tips

The plant care workshop is very important to ensuring the plants' survival. It is a great time to discuss the commitment required for this task with residents. It is also a good time to recruit leaders who will ensure, at least during the first season, that the plants are cared for. Care instructions left on site will serve as a reminder.

You can also have children contribute by inviting each of them to adopt a plant. This will make them proud, and they will take good care of their plant.

Take photos of the day! They will be important souvenirs for participants and good promotional tools for the project.

Example 2
Creation of a monitoring committee in Parc-Extension

MUEC worked with the community in the Parc-Extension neighbourhood (Montréal) to plan a Green Neighbourhood that promotes active transportation. To ensure the Green Neighbourhood plan would be implemented, the work committee became a monitoring committee.

The monitoring committee is comprised of municipal elected officials and professionals, representatives of community organizations, public health professionals, police officers, citizens, and merchants. The committee's mandate is to:

- Ensure the co-operation needed to carry out implementation measures;

- Identify levers to facilitate implementation (funding possibilities, scheduled road repair work, contribution from external sources, etc.);

- Advise the Villeray–Saint-Michel–Parc-Extension Borough and the City of Montréal, which are responsible for implementing the design projects;

- Ensure communication about the project with citizens and other stakeholders.

Three work subcommittees were created for "traffic and design," "mobilization and awareness-building," and "economics." Their actions included:

- A survey of customers of businesses on Jean-Talon Street West;

- Raising merchants' awareness of the importance of active transportation for the economic vitality of the neighbourhood;

- Pedestrian and cyclist counts in the Jean-Talon underpass;

- The creation of green mini-plazas by the Borough and its partners;

- Bicycle collection and setting up bicycle mechanic workshops.

Members of the Parc-Extension Green Neighbourhood Monitoring Committee.

Phase **6**. **INAUGURATE** designs

What ?

Once the participatory process has reached the project implementation phase, it is important to celebrate the project's success with the people who contributed. An official inauguration is an opportunity for project leaders to thank those who were part of the participatory process and keep them involved. The inauguration is also a way to increase project awareness, acknowledge the work accomplished, and announce what will happen next.

Why ?

• Celebrate the project's success and thank all participants

• Maintain their involvement until the end of a demanding process

• Inform other stakeholders and invite them to get involved for the rest of the project

• Explain and promote the project to the general public

• Officially launch project implementation

Who ?

• Everyone involved in the participatory urban planning process (citizens, professionals, decision makers, organizations, etc.)

• The general population

• Local stakeholders

• Media

How ?

• Celebration to launch the plan

• Official inauguration of the completed design elements

• Party with residents

• Press conference

• Distribution of promotional materials

Example 1
Inauguration of the cool island at Habitations Lenoir Saint-Antoine

Residents of Habitations Lenoir Saint-Antoine, the MUEC and Montréal's municipal housing board worked together to create a cool island on the housing project's property, previously surrounded by asphalt and concrete. Residents participated in the process from the first information session to the planting workshop. Once the project was complete, the inauguration of the new backyard celebrated the fruit of everyone's efforts.

During the inauguration ceremony, one of the children cut the ribbon, many photos were taken and there was an overall joyful mood. A community supper, served on the newly created patio brought together 20 residents and the project leaders to celebrate their success. Throughout the meal, the new garden elicited animated and joyful discussions.

Physical changes:

- Removal of 1,900 square feet of asphalt;

- 200 plants, including three trees and several fruit bushes;

- Covering blank walls with climbing plants;

- Installation of four large urban agriculture containers for a vegetable garden;

- Construction of a pergola and creation of a patio with picnic table.

Community supper at the inauguration of the new courtyard at Habitations Lenoir Saint-Antoine.

Example 2
Launching of the Plateau-Est Green Neighbourhood Plan

After a participatory process lasting several months, partners of the Plateau-Est Green Neighbourhood project in Montréal were happy to publicly unveil the results of the preceding stages, i.e., the Plateau-Est Green, Active and Healthy Neighbourhood Plan. Approximately 180 people attended the launch. Many of them were citizens who had been involved in the entire process, and it was an opportunity for them to see their efforts rewarded.

Participants were welcomed with a buffet and a glass of wine in celebration of this community accomplishment. The evening began with a presentation of the main goals and implementation measures of the Green Neighbourhood Plan by representatives from the Maison d'Aurore, the local partner organization, and the MUEC. The president of the Société de développement commercial de l'Avenue du Mont-Royal and the director of the neighbourhood round table expressed their support for the plan. Local elected officials joined them to confirm their commitment to the plan's implementation and to announce the measures that would be implemented first.

Then, citizens were able to comment and ask questions. The hearty applause that ended the evening was a testimony to the enthusiasm created by the plan's launch and the entire process leading up to it.

Launch of the Plateau-Est Green Neighbourhood Plan after months of work.

First-year commitments made by the Plateau-Mont-Royal Borough

Carry out studies on:

1.   Making intersections safer (five-metre clearance);

2.   Adding a stop sign at the intersection of Masson and Chabot;

3.   Modifying traffic directions on des Érables Avenue and Parthenais Street;

4.   Installing a curb extension at the intersection of des Érables and Masson;

5.   Reducing the width of Chabot and de Bordeaux streets;

6.   Adding bike racks and self-service bike stations;

7.   Closing alley entrances

EVALUATE the process and results

What ?

Evaluation is a very important part of the participatory urban planning process, and it is not always given enough time and resources. Data collected during the evaluation phase are very important. They can be used to demonstrate the relevance and scope of the actions taken and allow for corrections when needed.

Evaluation means identifying the results or effects of each action and comparing them to the original goals. Each activity, each phase, and the entire process should be evaluated, along with long-term design changes. Evaluation also means collecting data to better understand participants and their feedback on the activities.

> **Evaluation should be an on-going process that is planned from the beginning of the project and communicated to stakeholders.**

Why ?

Evaluation provides an understanding of the impact of actions to determine whether the methods used were sufficient, make adjustments where necessary, and increase effectiveness. Evaluation also serves to demonstrate the validity of the process and the relevance of the resources involved. It is a way to make funders, institutions, developers and the general public aware of the concrete results and testimonies from satisfied users.

Who ?

The organizers of a project or an activity are responsible, along with stakeholders, for evaluating the process, the results and whether the goals were reached. They also need to collect input from the people who participated in activities and the stakeholders involved in the process.

Depending on the available budget, it may be useful to use external resources specialized in evaluation or to develop partnerships with university researchers.

> *Are the goals clear?*
>
> Project goals should be clear, specific, measurable, and realistic. They make it easier to choose the right activities, help participants understand their role, and facilitate the evaluation of the results achieved.

How ?

- Checklist or evaluation plan[4]
- Questionnaire or evaluation at the end of the activity or process
- Participatory evaluation activity[5]
- Document the impacts, results and challenges
- Discussion group
- Interviews with key stakeholders
- Annual review
- Before/after photos

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4   Document which provides definitions of the goals, approach and evaluation strategies, targets and indicators, data collection methods and tools, as well as a schedule for the evaluation activities. References are provided in the appendix.

5   Evaluation activity in which participants are actively involved. Examples: Activity during which the project evaluation criteria are jointly defined.

Example 1
Evaluation of a participatory activity

MUEC organized two consecutive professional workshops during the Green, Active and Healthy Neighbourhood projects in Plateau-Est and Southeastern Notre-Dame-de-Grâce. While the workshops addressed two different issues, i.e., redesigning boundary areas and pedestrian crossings on arteries, the same professionals and citizens were involved in both.

Participants completed a post-event evaluation for each workshop, and comments from the first event were used to improve the second. For example, the size of the work groups was reduced. Also, their make-up was revised to ensure a balance between professionals and citizens and between experienced and junior professionals. More time was made for group work in order to develop more detailed ideas. Preparatory documents were sent to participants in advance.

The comments on the second workshop included the following: "Bravo! Good ideas that we should be thinking about"; "The workshop allowed me to refine my knowledge of the field, which will be useful in my work"; "Mixing citizens with professionals helped both groups understand each other's reality."

Participants at a professional workshop.

Example 2
Project annual review

In spring 2012, the MUEC organized an event called "Green Neighbourhoods Review" to take stock of the projects in Montréal. During the event, attended by 90 people, elected officials and the local project leaders presented the progress and accomplishments in their respective neighbourhoods.

The review provided an opportunity to measure all the work accomplished. It allowed the local project leaders to gain the recognition of the elected officials and promote the files related to active transportation in their neighbourhood. The activity raised a friendly competition between the boroughs, which all committed to implementing the priority measures in the short-to-medium term. The City of Montréal seized the opportunity to present its Green Neighbourhoods program, explain the process leading to their realization, and discuss funding possibilities for the implementation of the planned design solutions.

Credit: Le Plateau-Mont-Royal Borough

Presentation during the Green Neighbourhood Review of the designs completed in Plateau-Est.

4.

WINNING
CONDITIONS

To maximize the chances of a successful participatory process, implementing the following conditions is suggested:

1. Plan

a) Define the goals and broad outline of the PROCESS before starting the project

Good planning is an essential element for any project to succeed. Participatory urban planning processes are no exception to this rule. Improvisation and a lack of preparation lead to wasted time, to the detriment of final results. Establish clear goals, obtain the necessary means and take the time to adapt to the specific context of each project.

b) Institute a CULTURE of working collaboratively

One of the keys to success consists of creating a local work committee to implement the project. This committee will eventually be transformed into a monitoring committee.

Establishing a coordination structure and a common integrated planning tool are recommended to ensure collaboration between the different stakeholders involved. The idea is to foster interdisciplinarity in order to break the habit of working in silos and to get people who are not used to working together to collaborate.

c) Develop a VISION and common goals

We cannot emphasize enough the importance of having a vision and goals that are clear and shared by everyone. They will guide the entire participatory process. Also, adopting a common and clearly established vocabulary can help avoid misunderstandings.

It is important to create a climate of confidence in which everyone feels free to present their issues. This step may take a relatively long time, but establishing consensus from the start will save time later on.

2. Communicate

a) Keep stakeholders INFORMED

An effective communications strategy is indispensable to optimize the scope of your participatory urban planning process. The appropriate use of local media and social networks, as well as the publication of annual reviews, will keep all stakeholders and the public up to date on the evolution of your project.

For each significant activity, it is essential to provide an update of the project that summarizes the previous steps and results to promote better understanding of the process.

Remaining in contact with other stakeholders who are active in the area (even if they are not part of your participatory process) will allow you to avoid repeating efforts already made by other groups.

b) Promote your SUCCESSES

Publicizing your project's advances and accomplishments will encourage citizen commitment. Citizens will react favourably when they see their proposals become realities and their living environment progressively evolving in the desired direction.

c) Take advantage of mobilizing EVENTS

Neighbourhood activities and recurring events are ideal places to meet citizens and communicate the latest information on the project directly to them.

3. Engage

a) Get SUPPORT from decision makers

If decision makers are not involved in the participatory process, a solid case demonstrating the relevance and interest of the proposed changes must be developed to persuade them. Whether they are municipal department heads, housing project managers, real estate developers, elected officials or any other type of local decision maker, it is important to recognize their realities and allow them leeway so that they can feel comfortable with the process, make it their own and take on some leadership roles.

b) Work on COMMITMENT

Lead decision makers to make public commitments and follow-up regularly on their intentions. Commitments can take a variety of forms and may have different time frames.

c) INFLUENCE policies and practices

Create design plans and guides — such as traffic master plans or greening standards — so you can promote best practices and guide implementation projects. Encourage as many people as possible to learn about successful initiatives, locally and elsewhere, and get inspired by them.

4. Take advantage of every opportunity

Large-scale planning is indispensable to create the guidelines necessary to complete design projects, in particular for complex projects such as the transformation of municipal public spaces. Keep in mind, however, that organizations and municipalities have limited financial resources. This is why it is a good idea to be ready to take advantage of unexpected opportunities that may help complete a desired project, even if it means changing the plan. Such opportunities are a step forward toward improving the built environment.

Such opportunities may take various forms: road repair projects, emergence of political will, mobilization related to safety concerns, new government subsidies. For example, why not take advantage of projects on water pipes to change a street layout and enlarge sidewalks, add a bike path and increase vegetation or street furniture?

CONCLUSION

"Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody." – Jane Jacobs, *The Death and Life of Great American Cities.*

Communities are facing enormous challenges in the 21st century. Citizens, organizations and municipalities in Québec and Canada must transform their neighbourhoods and make them more sustainable. Whether they live in a village, a suburb or a metropolis, citizens are claiming the right to participate in decisions that concern their environment. At the same time, society is becoming more and more complex and diversified. It is becoming impossible for conventional urban planning stakeholders to define urban projects that meet everyone's needs by themselves. A strategic shift is needed.

In this context, participatory urban planning is a means of action available to leaders of a sustainable city. Although it cannot provide all the answers, it can contribute to better defining the kinds of living environments we want. It reinforces the power citizens have in their neighbourhood by giving everyone the opportunity to become an agent of change and benefit from the way the city is planned.

Taking into account multiple points of view requires innovation, openness, time, and energy from urban planning project leaders. This is challenging, but it leads to more satisfying projects that are better accepted and more sustainable. It requires creating a true space for dialogue, presenting issues transparently, being open to knowledge provided by ordinary people, accepting experiments, and making mistakes. It is important to keep in mind that the designs selected are not optimal solutions, but rather satisfactory compromises that allow for progress toward the collective vision the community has given itself.

"To my mind, these are daily successes. When I cross an intersection protected by a pedestrian signal and curb extensions, or when I see children pedalling on the bike path, I feel truly proud. When you can transform your neighbourhood, you feel that you are part of something; you develop a great feeling of belonging. And that is very special."

- Dominique Sorel, citizen, initiator of the Southeastern Notre-Dame-de-Grâce Green, Active and Healthy Neighbourhood project, Montréal.

Now it is your turn to begin a participatory urban planning process. Draw on our suggested approach, make it your own and adapt it to your context. In short, jump in! Your process will lead to meetings, debates, and dialogue. Mostly, it will improve the daily lives of children and parents, seniors, business owners and neighbours.
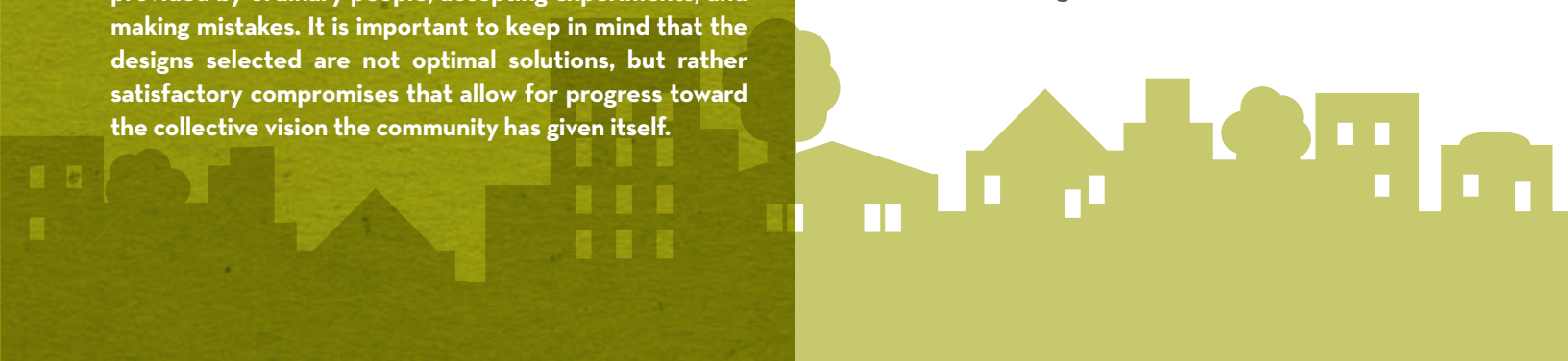
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GLOSSARY

Social acceptability: "The public's support for a project or a decision based on the collective wisdom that the project or decision is better than all other known alternatives, including the status quo."[6] It must be the result of a true dialogue between decision makers and citizens. It requires a climate of confidence, transparent exchange of information and open debate.

Universal acceptability: "The characteristic of a product, process, service, environment or information that allows everyone to carry out the same actions independently and achieve the same results, in an effort to achieve equity through an inclusive approach."[7]

Stakeholder: "Person or organization with an interest because they will be affected or may have some influence."[8] In participatory urban planning, a stakeholder is someone who plays an active role in a planning process or a project.

Decision maker: "An individual or organization in charge of making decisions about the activities in an area for which they are responsible."[9] In a participatory urban planning project, decision makers can be elected officials or municipal professionals, housing managers or real-estate developers. It is important to include these stakeholders in the process because they have the power to make decisions about possible design solutions and the resources required to implement these solutions.

Field study: A direct data collection method applied to a project area. Field studies are used to collect factual information (e.g., counting buses, pedestrians, cyclists, public space users; evaluating a space objectively using an analysis or observation grid — for greening potential, for example; measuring the time it takes to walk from one place to another) or perceptual information (feeling of safety, user impressions, etc.).

Built environment: All elements of the physical environment created by humans. The built environment includes buildings (housing, schools, stores, etc.), transportation infrastructure (streets, sidewalks, bike paths, railroads, etc.), parks, public places, athletic equipment, etc.

Public space: A public portion of municipal property. Public space includes streets, public squares and parks. Its design and maintenance are primarily the responsibility of municipal administrations (and sometimes the provincial or federal governments). This is why it is so important to involve professionals and elected officials in projects that involve public space.

Partnership: "A fair, complementary relationship between two parties that are different by their nature, mission, activities, resources and operating modes. The relationship is founded on interdependence and mutual respect and recognition for the contribution of each party [...] The partnership is justified to the extent that any required action cannot be taken by only one of the partners. In addition, a specific framework must be put in place to help the partners 'act together'."[10]

Citizen participation: An active exercise of citizenship "using individual and collective forms of engagement to achieve a specific social transformation within a community or society."[11] In urban planning projects, citizen participation is usually a formal arrangement implemented by decision makers or other community stakeholders (public institutions, not-for-profit organizations, private enterprises, etc.). To be truly called citizen participation, the arrangement must ensure that citizens' findings and suggestions will actually influence the decisions made. Citizen participation can also be the beginning of a participatory process (e.g., citizen committees that invite other stakeholders to continue a process that they have already started on a local planning issue).

6   Gendron, 2014.
7   Langevin, Jacques et al, 2011.
8   Wates, 2008.
9   Office québécois de la langue française.
10 Bourque, 2008.
11 Mercier, 2009.

Planning: In urban design, planning is a set of steps that begin with an urban planning problem and end with the implementation of solutions. Planning includes research to deepen knowledge of the identified problem, creating a vision or major goals to guide the development of design scenarios, developing solutions, and integrating them into a coherent plan. After planning comes the implementation of the developed plan and follow-up.

Diagnostic portrait: The *portrait*, also called a general overview, is a summary of the characteristics, problems and assets of a community or project area. It includes the issues targeted by the urban planning project, which are documented using indicators and qualitative and quantitative data. The *diagnosis* is an analysis based on the portrait that is used to identify the project area's strengths and weaknesses, the limitations to action, and the potential positive opportunities for decision makers and other community stakeholders.

Pedestrian potential: Degree of safety, esthetic and interest of a pedestrian itinerary. It is an urban concept that can be described as the pleasure of walking, pedestrian accessibility (of a place), neighbourhood walkability, etc.

Urban planning professional: An urban planner, transportation engineer, architect, urban designer, landscape architect, etc., whose work involves planning, designing and evaluating the organization of a project area and the built environment to ensure human well-being and a quality environment. Such experts work in the public sector (ministry, municipality, RCM, etc.) and the private sector (consulting firm, non-profit, etc.). In the participatory planning process, they are stakeholders who are experts of technical solutions to be implemented to meet identified needs.

Design solution: An idea, concept or technical solution illustrated on a plan, a cross-sectional view of a street, a visual simulation or a model. It includes a brief description of the proposal, its strengths and limitations, and the problems it seeks to resolve.

Active transportation: A utilitarian human-powered mode of transportation that requires muscular effort to arrive at one's destination. Examples of active transportation are biking, scootering, rollerblading, and walking.

Participatory planning: A built environment planning or design process that involves sharing, and sometimes even *transferring*, responsibility to citizens, whether they get involved spontaneously or are solicited by process leaders.[12]

Greening: The planting of trees, shrubs and climbing plants generally in areas with no vegetation to improve public health and the quality of the environment (e.g., to reduce paved or asphalted surfaces, reduce urban heat islands, and collect rainwater).

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12   Zetlaoui-Léger, 2013.

ABOUT THE MONTRÉAL URBAN ECOLOGY CENTRE

The MUEC is a not-for-profit organization whose mission is to develop and share urban policies and practices to help create green, democratic and healthy cities.

Approach
The MUEC promotes the development of a true culture of participatory urban planning in Montréal, Québec and Canada. Citizen participation is at the heart of its process to create more people-friendly living environments that respond to the needs of the public.

Services
The services offered by the MUEC facilitate the involvement of citizens in the planning process and the development of urban planning projects.
- Community support
- Facilitation of participatory processes
- Field studies
- Training
- Development of tools and manuals

Areas of expertise
- Urban design
- Participatory budgets
- Citizen participation
- Greening

Clientele
- Governmental agencies
- Public health and academic institutions
- Municipalities and boroughs
- Municipal housing boards
- Community organizations and citizen groups
- Organizations interested in applying the participatory approach

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