Let's ROC: A Dynamic Experience-Based Roadmap for Relational Engagement

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Abstract:

Design/methodology/approach – This paper emerges out of an ongoing collaboration between consumer researchers and a theatre company. In analysing the complexities and dilemmas of conducting relational engagement, we reflect on a number of key learnings to extend these to other researchers.

Purpose – We provide researchers with an experience-based roadmap for relational engagement which illustrates how to scale from small impacts to larger ones. While the relational engagement approach is still nascent and unfolding, it is being advocated and implemented without a full understanding of the balancing act and complex trade-offs it requires.

Findings – We highlight some of the antecedents of relational engagement including mutual understanding and nurturing rapport. We demonstrate that relational engagement requires a number of iterative cycles, indicative of the time commitment needed to form a successful partner relationship. We show the significance of a purpose-centric perspective and note that the ethical responsibilities of such a perspective require an adaptive and reflexive approach, which in practice can mean ceding power.

Research limitations/implications – Our research is limited in that it focuses on only one emerging example of relational engagement in a particular context, namely the cultural sector. Further research will be needed to develop the roadmap in adapting it to ensure applicability in other contexts.

Practical implications – Our work shows that impact-making has a dynamic, non-linear shape that requires an open mindset, curiosity and the capacity to imagine different configurations of partners within the ecosystems in which we work.

Social Implications – We present novel insights around the caring challenges that emerge in relational engagement and how a caring approach is required as well as the values that emerge out of such an approach.

Originality/value - The originality of this paper lies in recognising the reciprocal but not necessarily equivalent relations that underpin impact projects and demonstrating how developing a caring in action approach can generate closer cooperation between researchers and cocreation partners for practical and impactful knowledge development.

Keywords: Research impact, transformative consumer research, relational engagement, dynamic collaborative partnerships, care

Paper type: Impact paper

1. **Introduction**

As evidenced by the introduction of the new 'impact article' in this very journal (Keeling and Marshall, 2022), marketing academics are increasingly seeking to demonstrate the societal impact of their work. As the editors make clear: "collaboration is key to achieving impact" (p. 2509) and this means engaging with a variety of stakeholders ranging from consumers, businesses, nonprofits, media and government. The transformative consumer

research literature has been particularly significant in exploring a relational engagement approach for some time as well as the principles that guide this research approach (Ozanne, Davis and Ekpo, 2021; Ozanne et al., 2017; Piacentini et al. 2019). Yet, while the community is encouraging this work and has demonstrated its importance, it is still very much a nascent and unfolding research approach and the complexities and dilemmas of conducting relational engagement have not received sufficient attention. Indeed, the recent impact task force (Ozanne et al., 2024) note that academics lack training as to how to collaborate with diverse partners and how to document such impact. Furthermore, they claim that a rebalancing of power is needed and that impactful research is a long-term "process not an outcome" (p. 196). Finally, they suggest that emotional intelligence is required as relationships require "a wide range of personal and interpersonal skills" (p. 199). In this article we argue that relational engagement is being advocated and implemented without a full understanding of the balancing act and complex trade-offs it requires; it is unclear how to actually do this type of research and how to build and manage long-term relationships with multiple stakeholders with sometimes competing interests. We therefore present a methodological approach to provide researchers with a pathway to scale small impacts into larger ones which accounts for the dynamics of an iterative approach. We argue that this requires significant re-framing in order to change perspectives, moving from micro- to macro- for attentiveness to the whole. We also highlight how a caring approach (Tronto, 2013) can be useful in ensuring alignment amongst stakeholders.

The significance of a 'relational engagement' approach (Ozanne et al., 2017) in order to respond to pressing societal concerns has been demonstrated. Relational engagement is defined as an approach in which academics collaborate with "stakeholders building on their everyday understandings, interests, and expertise" for societal impact (Ozanne et al., 2017: p. 5). This research does not emerge from a one-way flow but rather through numerous intricate, delicate and multidirectional influences (Ozanne et al., 2021). Ozanne et al. (2021), present a typology of relational engagements ranging from limited, short-term, and tactical to more extensive and strategic relationships and highlight that the researcher is only "one actor in a complex network" (p. 133); while this should come as no surprise to us, it is clear that much of academic knowledge production still occurs through top-down expertise rather than more collaborative, dialogic and community-oriented approaches. Relational engagement entails a more reflexive researcher who can react to circumstances as they are happening and be conscious of equity and ethics in managing relationships by establishing mutual understandings, addressing power imbalances and building trust to take a purpose-centric rather than an exclusive researcher-centric or stakeholder-centric approach for long-term impact. We present a dynamic experience-based roadmap for relational engagement which takes into account resourcefulness, obliquity, and caring in action (ROC) to navigate the obstacles and difficulties of the concrete realities of working with stakeholders beneath the abstract ideals of relational engagement as set out in the literature. We illustrate this research process using findings from an ongoing study in partnership with an independent UK theatre company.

The impetus for this project was a direct result of the project lead's concerns and care (as per exigency research, Ozanne et al., 2021) about the UK cultural sector, particularly as a result of funding cuts and the disruption of the COVID-19 pandemic. We, a team of consumer researchers, all of whom have engaged in research in and on the arts sector, approached a particular theatre due to its focus on social impact in terms of providing artistic responses to societal issues and providing financial and creative support to relatively unproven and marginalised artists. We established a partnership with this independent theatre precisely because of the researchers' and the theatre's interest in – and focus on – ethical ways of working (for more on the project itself, see Appendix A). Our aim was to establish an extensive and

strategically driven enagement (Ozanne et al., 2021) with the theatre and its community of stakeholders, but this aim is not yet achieved despite considerable agreement on the need for promoting ethical ways of working. There is no doubt that successful impact projects are possible, and we now have systematic ways of defining, measuring, accelerating, managing and securing success (Ozanne et al. 2024). Yet little consideration has been given to projects that do not align to such a typology of success and that are "undermined by logistical complexities and failures to follow through" (Ozanne et al. 2024: p.198). Reflecting only on success overlooks accounts of the challenges, obstacles and failures in doing impact with stakeholders, which arguably, may be present in any collaboration – whether successful or unsuccessful. We find the theatre context to be a useful one in illustrating many of these complexities due to lack of resources and underfunding, underrepresentation and exclusion. Furthermore, this is a sector that struggles with competing goals, both economic and artistic, which require significant compromise between various stakeholders. What we present here is therefore not an analysis of the project or the consumer data collected but rather, an account of the challenges in establishing, developing and nurturing such an engagement over time, reflecting on the often overlooked difficulties in managing equitable partnerships. We provide a prescriptive account of relational engagement based on lessons learned for achieving relational engagement in transformative consumer research.

2. Problem generation and impact to be achieved

As the transformative consumer research literature clearly evidences (Ozanne et al., 2017), for societally impactful research to occur, we must focus on community-engagement and knowledge hybridity. This requires disrupting our taken-for-granted beliefs and assumptions about what constitutes research and knowledge, what a good data set is and what a good researcher-participant relationship is. Indeed, relational engagement demands more open forms of knowledge creation and dissemination, more reciprocal and collective relationships between researchers and researched and more non-linear and open forms of knowledge. This is no easy task, as previous research shows. Ozanne et al. (2021: p. 128) argue that we must move away from solitary and independent scholarship to embrace more "complex and multidirectional networks of co-influence." Indeed, the impact task force (Ozanne et al., 2024), highlight that existing university reward structures are not fit for impactful research and the timelines in particular are incompatible. They further stuggest that a "radical rebalancing of power in the knowledge production system" (p. 195) is required. How to accomplish this rebalancing has, as of yet, however, not been explicated.

Piacentini et al. (2018) specifically investigated the barriers faced by marketing academics in creating and sustaining impactful relationships. Despite adopting their useful recommendations, we faced many of the same dilemmas (differing resources and approaches, goal misalignment and, mistaken assumptions about the other party) in building an impactful relationship. We gradually came to realise that the complexity of a relational engagement approach is largely due to it being a "process not an outcome" (Ozanne et al., 2024: p. 196). That is, the project shifted and changed through time, at least in part due to working with different stakeholders at different stages of the research. For example, in our case, access to the theatre was secured as result of a relationship with a leadership fellow working within the theatre for a defined period of three months, providing the theatre leadership team with extra capacity to consider some wider, more long-term concerns in terms of audience development. An initial meeting took place between the leadership fellow and members of the research team to discuss the potential needs of the theatre and the prior research and research skills of the team. Having the opportunity to refine our plan with someone engaged with the theatre but not formally attached to it was an insightful exercise. Our initial contact, the research fellow, left before the project commenced and following her departure, we worked in close cooperation

with our main point of contact, the executive director. Once we had collected our data, a sudden departure of the leadership team required us to reframe the project. What is significant here is that while Ozanne et al.'s (2021) typology of relational engagements, ranging from limited, short-term, and tactical to more extensive and strategic relationships, is very useful, it is not to be taken as a static research state. Indeed, the impact task force suggest "transformational change is dynamic, not linear" (Ozanne et al., 2024: p. 196).

As our case illustrates, relationships are dynamic and evolve over time, moving through various types of relationships. Therefore, flexibility is key and in building on Piacentini et al.'s (2018) study. We highlight that the barriers they present are in many cases unavoidable, even if we are aware of them and and cannot be completely overcome given the institutional systems and practices of academia as they are currently set out. However, we present productive ways of working and researching that allow for a more humble research stance to avoid the epistemological pitfalls which arise from centring the researcher and marginalising the researched. Indeed, Lynch Jr. (2024) recently warned us to be wary of "overconfident" scholars who take a top-down approach and to admit that we have an incomplete perspective which must be supplemented by those of others. If as Ozanne et al. (2017) suggest, we must engage in creating knowledge products *in partnership* with stakeholders, a more fine-grained focus on how to approach, reframe and adapt to such a partnership is needed. To do so we present a three-stage roadmap (for the general stages and guiding principles see Table 1) which introduces a 'care-full' positioning so as to move towards more collaborative, dialogic and purpose-oriented forms of knowing and doing research. Our framework focuses firstly on resourcefulness given that rescource scarcity pervades academic work. This protective, scarcity mindset, we argue, only exacerbates perceived limitations, a sense of competition, and barriers to research; narrowing the focus of both attention and aspiration and fixing efforts to implement individual protective strategies which often only result in short-term wins. In focusing on resourcefulness instead, we seek to nurture a more playful and purposeful mindset for researchers to open up the spectrum of possibilities to reimagine not only alternative paths for future impact making but also alternative partners and allies for long-term impact. Secondly, we highlight obliquity (Kay, 2011) as a gradual process of risk-taking and discovery. Given the resource scarcity noted above, the pathway to impact is challenging. We suggest that in most cases then, goals can only be achieved when approached indirectly. We thus highlight some of the values and tactics we found useful to adopt in order to be more flexible in our relational engagement. Finally, we draw attention to caring as a fundamental component of a relational engagement approach without which long-term transformative engagement is impossible. While we describe our roadmap in a linear manner for clarity, we note that due to its dynamic, iterative and unpredictable nature, it requires adaptability (see Figure 1).

3. Working with stakeholders: imperfect partnership formation

The first stage of our roadmap focuses on the partnership formation process. We stress that any partnership formation is imperfect by nature, not least due to the barriers that Piacentini et al. (2018) describe. Rather than seeking perfect alignment, it is about *progressively establishing mutual understanding*. This means being attentively attuned to the context we are studying which is not possible without a keen understanding of the dynamics of the sector and prior expertise. However, it is essential to not assume we know everything (Lynch Jr., 2024) and to embrace change and uncertainty in our approach. This requires creativity and an openness for mutual discovery. Indeed, we argue that in all research, but particularly in taking a relational engagement approach, there are no absolutes but rather a plurality of potentialities and therefore curiousity and inquisitveness are to be nurtured. It is particularly important, at the beginning of the project, to acknowledge these potentialities and seek to disrupt and open up our taken-for-granted assumptions rather than seek to close down and delimit our knowledge. This is a 'made by making' approach which is flexible and allows for mutual discovery through co-creation.

In practice, in our case, given our previous experiences with a range of arts organisations and our understanding of the pressures on their time and resources, we undertook this project considerate of the need to make minimal demands on our partners at the theatre. We appreciated the delicate balance we needed to maintain between demonstrating our knowledge and expertise in working in the arts sector while co-creating a research project that would deliver for the partner and also for our needs as researchers. We were alert to the theatre's lack of resources and did not impose any demands either financial or otherwise, instead funding the project through an internal research grant. We clarified from the outset that we would require limited input beyond the scoping exercise and this was agreed.

It is important not to underestimate the time establishing a mutual understanding takes and there is a need to be present in meaningful spaces for empathetic listening and reciprocal perspective-taking to become possible. This can allow us to avoid the barriers to relational engagement Piacentini et al. (2018) identify. In particular, we highlight that while Piacentini et al. focus on "both parties" (p. 334), we suggest a less fixed approach – while the partnership may start as a dual partnership, we must be open to other stakeholders and avoid any predetermined rigidity. We must leave space for unexpected partners as any project will involve a broad range of societal stakeholders. This is particularly significant in moving away from a resource-scarcity perspective, although resources will always be limited, it is through being open to others and to more creative approaches that we can discover other pathways for impact. This is why any initial conversation on assessing and mapping resources must be tentative and it is helpful to think of 'resources' in the widest possible way as any skills, practices and cultures that could have use in generating impact as well as financial and institutional resources.

The impact task force (Ozanne et al., 2024: p. 199) highlights the need for emotional intelligence and "empathy, listening, [and] curiosity." We further emphasise these skills as essential to a relational engagement approach. It was only by taking the time to ethnographically observe the theatre, its audiences and the work it makes that we were able to *nurture the trust and rapport* needed for the partnership. As the project evolved, it became clear that the tacit knowledge of theatre staff and their understanding of the tone of the theatre's communications was an under-exploited resource. In surrendering our position as 'experts' and making use of this tacit knowledge, we improved our research methodologies and therefore, the data we collected. Indeed, it was by nourishing our own empathy and curiosity that we could engage with other stakeholders, whether other members of staff within the theatre or audience members. It is therefore essential to remain open in terms of partner identification and approach taken. Similarly, while there is a clear impetus to set out a project's boundaries

and goals as specifically as possible in order to ensure alignment, a nondual mode of engagement can allow for a broader focus in order to focus on the wider stakeholders and a more flexible approach in redefining goals. As this community evolves through time, new affinities may appear and more appropriate or practical goals can emerge in the process, resulting in unexpected impact.

4. The knowledge exchange, (co-)creation and learning process: mutual unlearning, reflecting and reframing

Given the reality of an imperfect partnership, clearly tensions will arise as part of the knowledge exchange process. In our case, in discussing competing priorities for the theatre, the misaligned expectations of stakeholders became evident, surprisingly, even including our own. We witnessed multiple instances where our partnership suffered from shifting timelines, limited opportunities to make decisions, insufficient resources and a perceived lack of trust in our expertise. These frustrations are echoed in the literature, the impact task force notes that "stakeholders aren't always keen or supportive!" (Ozanne et al., 2024, p. 198). It is important to acknowledge these frustrations but also to accept our own *ethical positioning and responsibility* in the partnership. This entails moving beyond the empathetic approach discussed above, to becoming more reflexive. Reflecting on collective aspirations instead of simply comparing two parallel agendas is paramount. This means aligning values and practices. While an avowal of the need for reflexivity in research emerges clearly across much of the literature, we suggest a need to go beyond 'personal' reflexivity focused on the researcher, to centre it on the research journey itself and it's broader purposes. Any success of the project relies on collaboration and acknowledging the various forces at play in such a collaboration means taking a step back and looking at the goals and aspirations at the heart of the project to better understand the ethical approach which is central to the collaboration. Indeed ethics are contextual rather than rule-governed (although the structures of academia do not always acknowledge this) and it is only in being attentive to the various stakeholders needs that we can tailor our action to the particularity of the specific situation.

Furthermore, this attentiveness to the other goes beyond interpersonal dyadic relations, as discussed above, but rather is about an 'engrossment' which involves a wider perspective which is *purpose-centric.* Indeed, while it is easy to get wrapped up in miscommunications, frustrations and tensions, we must remember what brought the relationship together in the first place. That is, the shared objectives. We argue that if some type of transformation is the goal, then it is not about more of the same but rather, the process of impact making will require disruptions and discomfort, whether this is in terms of ideas, knowledge or even partners. Indeed, for impactful transformation to occur, there is a need for risk-taking. For example, remaining too localised (although we must start somewhere) or too fixed in outlook can limit the potential of the project. While stakeholders can join and sometimes leave a project, the purpose should stay and therefore needs to be ambitious, giving all involved something to work towards and unite around. In our case, the clear purpose which united all stakeholders was establishing more just and equitable working practices in the theatre sector. Yet, it was by properly engaging with the art being made and its audiences, rather than the practices making it, that we could conceptualise an agenda for EDI training through theatre. That is, in bringing together purpose and unacknowledged resources, we could offer a transformative purposeful solution which could also resolve short-term problems in contributing to the theatre's finances and ultimately, could be scaled up to the broader sector.

In taking this more collective perspective and paying more attention to reciprocity, mutual respect and felt relations of trust, there is a need to deal with unequal power relationships and to acknowledge that these shift over time, requiring flexibility and resilience. Hutton and Heath (2019: p. 2713) focus on the power relations between researchers and research participants in

impact, arguing that an emancipatory research praxis is a "fundamental challenge to the institutionalised power relations between researchers and research participants." Another important part of relational engagement then, is *decentralising power and re-balancing exchanges*. This means adopting the principle of obliquity to ensure not being too reliant on any one stakeholder's power and resources as if this changes, the project will collapse. More significantly, in order to decentralise and re-balance power, we must consciously think about the weight of our own roles, as well as those of the stakeholders we are working with. In our case, when we presented our initial recommendations to the theatre, the lack of feedback from the executive director gave us the impression that he was unimpressed with our data and report. This felt like a power imbalance in that we had given without any real sense of reciprocal appreciation as to whether our research was useful or not. Contrarily, without an in-depth understanding of academia, the executive director could assume we had the research we needed and wanted for publication(s) and he had given appropriately and significantly to us in term of access. It eventually transpired that this unresponsiveness was due to his impending departure. We can draw a number of lessons from this. Firstly and most obviously, the need for more frequent feedback exchanges and to approach these with openness and humility. Secondly, we cannot assume in stakeholder relations that either party completely understands what the other is 'giving.' Thirdly, and most significantly, there is a need to cede power in impact projects, something we are not always familiar or comfortable with as academics as our academic authority is tempered. This is what we mean by 'unlearning' (Preece et al. 2023), that is, surrendering or releasing our own expertise which we had worked hard to acquire in order to focus on the broader perspective. This may mean going in unexpected directions and trusting our partners or alternatively, branching out to work with others. Power and authority does not flow only in one direction, it is constantly shifting and therefore requires adaptability and validation from all parties. We had to acknowledge that in our own partnership, we were not sufficiently attentive to the competing responsibilities and challenges that the theatre faces (which we as researchers were unaware of) and their invisible labour in providing us with access to their audience and other stakeholders.

5. Impact outcomes: responsive action and impact evolution

As illustrated above, successful relational engagement requires attentiveness and responsive action. In order to ensure *sustainable and strategic relationships*, a purpose-driven approach is essential. In our case, it is this purpose which ensured that we reframed any setbacks. For example, it is only when the leadership team left the theatre that we considered the future potential of the project in developing a network of ethical practices and actors, again leveraging some of the existing connections the theatre, audiences and donors had.This illustrates the point that relational engagement has a multi-actor dimension that we often take for granted or do not accord sufficient importance to. Furthermore, we must consider fallbacks (alternative plans) when designing research and impact projects, particularly in working with a range of stakeholders and if possible, having alternative points of access rather than being reliant on any one individual. As noted, relational engagement must be iterative, and therefore its dynamic, improvised nature is difficult to navigate and maintain. As we have seen projects evolve over time and while establishing trust may require low stakes interactions between researchers and partners prior to embarking on more resource intensive projects, it is important to be open in order to avoid limiting the impact unknowingly. We have managed to negotiate a more extensive and strategic relationship with the theatre by for example, being more creative and open in disseminating our research findings and reaching out to new potential stakeholders. This, once again, highlights the difficulties of impact work in that it is impossible to really know what that impact is before achieving it, once again putting academic success criteria (funding, ethics applications, journal articles, promotion boards) at odds with actual social

transformation (Ozanne et al., 2024). In achieving *impact and outcome-enhancing engagement*, we must again not lose our sense of purpose and be attentive that any measurement of impact is not at odds with our ethical responsibilities and goals. Impact varies significantly, and is difficult to measure, particularly in the short-term. Indeed, process-driven research, developed interatively with non-academic partners at all stages, is less amenable to common measures of 'reach' and 'significance.' Our work also highlights the importance of reshaping collaborations and reframing ideas to potentially cater for the needs of other stakeholders. In this sense, impact-making has a dynamic, non-linear shape that requires an open mindset, curiosity and the capacity to imagine different configurations of partners within the ecosystems in which we work. This also requires a consideration of the fragility of these collaborations and the importance of taking a perspective of care in accounting for the feelings and emotions of all stakeholders.

6. The ethics of impact: caring in action

In applying a *caring* lens (Tronto, 2013) to relational engagements, we seek to highlight the limits and obstacles which are outside our control as researchers and acknowledge the vulnerability inherent in reflexivity in recognising this. However, we also attempt to posit how our partners may at times feel 'un-cared' for just as we may do throughout the collaboration process. Our reflections move away from identifying 'faults;' instead, re-evaluating our challenges as caring challenges can provide us with a much needed new perspective on missteps. We argue that an ethics of care is far from being a romanticised relationship with a vulnerable or marginalised other over whom we exercise power, but rather, is a relationship in which contradictory feelings are resolved by overarching aims providing daily standards to values and practices. Again, this means rejecting the dichotomic relationships which are embedded into our Western knowledge systems e.g. knower and known, self and other developed in moral theory and liberal economic theory and focusing instead on the relational, interdependent as part of a network of relations. Rather than 'caring for' or 'caring about,' it is 'caring with' that is most significant in our purpose-driven approach to relational engagement. Our case shows how an alignment of caring practices and values is necessary so that the work is recognised, valued and resourced appropriately for every party to benefit. Our framework highlights the questions which will help researchers take a more care-full approach. Just as goals and resources need to be discussed and shared for the success of the project, there is also a need to be more transparent in discussing how care will be prioritised by all stakeholders. Ultimately, we characterise relational engagement as a collaborative venture developed through focused attention to the specifics of the context in its entirety without imposing preconceived ideas or judgements, while activating imagination, empathy and actively engaging with all stakeholders.

7. Conclusion

Through our ROC roadmap, we contribute to the transformative consumer research literature in three key ways. Firstly, we highlight the need for a dynamic and flexible approach to impact projects. Although the existing research on a relational engagement approach demonstrates that there are numerous types of relationships possible (Ozanne et al., 2021), they tend to assume that these relationships remain rather static, which favours a more sequential and strategic planning vision. This does not fully account for the fluctuations which are unavoidable in any type of relationship, particularly if we are seeking for longer-term relationships. Our case shows that as the relationship evolved and key stakeholders within the partnership left, and others came in, we needed to be attentive to different needs, resources, habits of working, rhythms. This requires adaptability and responsivity. Our use of obliquity is essential in recognising that we sometimes need to take a step back to move forwards, requiring

a mindset of discovery. As Kay (2011: p. 8) argues, "the environment – social, commercial, natural – in which we operate changes over time and as we interact with it. Our knowledge of that complex environment is necessarily piecemeal and imperfect. And so objectives are generally best accomplished obliquely rather than directly." We note the ambiguity of our roadmap in that although we provide illustrations and recommendations, we cannot stipulate strict rules given the need to respond to the specific context at a specific time. We have repeatedly noted the limitations of a linear mode of thought, we argue that models are not a perfect vision of reality although they may be useful in directing our action. Kay (p. 9) further argues that "our objectives are often loosely described and frequently have elements that are not just incompatible but incommensurable. (…) We deal with complex systems whose structure we can understand only imperfectly." While our context was the cultural sector, we suggest that ROC is applicable for any sector. We note that our approach requires a high risk-tolerance which many creative practitioners embrace through envisioning, that is, learning to picture mentally what cannot be directly observed and imagining future outcomes. There is a need for playful experimentation without a preconceived plan. We acknowledge that this may be difficult in more risk-averse contexts, yet, we also suggest that for this very reason, a ROC approach can be transformative.

Secondly, given these complex dynamics, there is a need to reflect on and manage the evolving power dynamics between partners. We know from previous studies (Piacentini et al., 2019) that the key barriers to stakeholder engagement are "(1) differing resources and approaches to resource investment in research; (2) competing goals and goal alignment; and (3) diverse assumptions about the other party." Indeed, we struggled with these challenges in our own project. In building on Piacentini et al.'s study, we not only highlight the need for reciprocal perspective-taking but suggest that by more consciously acknowledging power dynamics, researchers can deliberately cede power, taking a more deliberately purpose-centric approach. We argue that this is required if we really do want to solve real-world problems. We note that power is not always hierarchical; social capital and informal networks can influence decisions and that this also needs to be acknowledged. In assessing and mapping the sources of power for all stakeholders (e.g., financial resources, knowledge, social networks, organisational position) and how these impact decision-making and project outcomes, we can more deliberately include the voices of those who might be marginalised or have less formal power, distribute our own authority and address any conflicts.

Third, we note that while trade-offs are needed, these alone are not sufficient for long-term impact. We advocate for deliberately incorporating care into our relational engagement approach. It is care that allows the various stakeholders to see beyond an immediate trade-off and achieve long-term impact beyond short-term gain. While care has received some attention in recent marketing research, its significance has been largely assumed rather than specifically discussed in the transformative consumer research literature. Of course, as Ozanne et al. (2021) note, the very reason why impact projects start is more often than not, due to care. Our case delineates the significant caring challenges at the heart of the relational engagement approach and we note the practices and values that are needed for transformative research to succeed. In forewarning researchers of the potential pitfalls of conducting societally impactful research, we call for a more conscious introduction of collaborative care in research partnerships and projects going forward to make space for unexpected, resourceful and indirect ways of discovering impactful collaborative routes. This caring in action approach requires adjustments in terms of how impact-making is documented and valued in academia as others have previously noted (see Ozanne et al., 2024). We call for further research on this pressing issue.

8. References

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Appendix A: Ongoing collaboration with a theatre

Aim of the project:

The project seeks to understand an independent theatre's audiences to foster more loyal relationships with audiences and explore any opportunities to diversify the theatre's revenue streams.

Research methods:

The research team familiarised themselves with the theatre in terms of their previous productions and information about how they supported artists and communities during the COVID-19 pandemic. Drawing on collective experience of working with theatres and understanding their audiences and motivations to give, we identified a series of questions that we could address which might be useful for the theatre in navigating the dual challenges of shifting audience behaviour post-pandemic and the usual resource challenges faced by independent arts venues. Data collection consisted of three stages (see Table 2). Firstly, we developed an online survey to reach a broad cross-section of the audience. The executive director was successfully involved in ensuring the survey reflected the theatre's 'voice.' Secondly, periods of in-person data collection were facilitated by the theatre as ticket holders were informed that we would be at the theatre to speak to audience members before and after the performance and were invited to speak to us. On arrival at the theatre, those working at the box office/café directed audience members to us and encouraged them to participate in the study. In exchange, we offered participants a free drink to build rapport. This recruitment

strategy was very successful and provides evidence of productive collaboration. Three members of the research team interviewed the theatre audiences and interviews were conducted as single interviews or in groups of two or three audience members depending on the flow of participants willing to be interviewed at any given time. This created quite a naturalistic interview style with lone theatre goers opting for one to one interviews, while pairs of small groups offered interesting insight into how audience members influence each other in choosing to watch specific performances. Audiences were very engaged during the interview process, reflecting the excitement and interest the theatre and its offer generates in the local community. We also were provided with access to existing donors and arranged longer, online interviews with them. Finally, to offer an additional layer and to encourage participants to open up about the role of theatre in their lives and how they felt about this specific theatre and the production they were attending, we also placed a 'mood board' in the foyer of the theatre and invited participants to post a post-it note with how and what they were feeling about the show they attended. Mood boards act as aesthetic objects representing visual clues in short text or images that set the tone for conversations and interpretations and immerse participants into the research project. Creative workers and audiences are particularly suitable for mood boards as they often want to express themselves beyond the boundaries of rigid questionnaires or structured interviews. Mood boards also foster a sense of connection as each participant's contribution can inspire others to explore different topics and interpretations. As we were interested in how the theatre could facilitate transformative consumption experiences and how these could be mobilised in support of the aims of the theatre, this mood board offered additional insight into motives and emotions.

Method	Number of participants
Multiple informal interviews with: research fellow, executive director, new artistic director, new executive director and marketing manager	
Naturalistic interviews with audiences (across 3 plays)	82
Online interviews with donors	6
Mood board	92
Survey responses	445

Table 2: Methods

Findings and recomendations for the theatre:

Our findings highlight the heterogeneity of the theatre's audience, before our research there was little understanding of the composition of the audience. In identifying three main types of audience, our research allows for the theatre to plan a clearer audience development strategy. We found the audience to be composed of: firstly, and most significantly, theatre professionals themselves, who attend to keep up with the cutting-edge work that they know this theatre produces and who know about the caring approach the theatre takes in supporting artists and in adopting more ethical working practices (for example, providing free rehearsal space for artists, avoiding exploitative working contracts). Secondly, an 'issues based' audience, motivated by specific types of stories such as queer theatre or stories from and about people of colour. Within this audience, there is a combination of those seeking to be represented and those wanting to learn. Most of this audience are not loyal to the theatre venue but to the company who created and performed the play or motivated purely by the issue/topic of the performance. The third and smallest group is composed of those who are loyal to the theatre itself. This loyalty, we found, is due to the theatre's reputation in continually providing challenging, impactful, risk-taking work on topics of societal relevance.

In large cities such as London, it is more likely that audiences will have a group of theatres that are in their 'choice set' and our initial recommendation in line with our brief, was to have the theatre placed centrally to this or to move up the hierarchy within this choice set. A way of achieving this we proposed, was to more clearly position and rebrand the theatre as an 'ethical theatre' in that this would cut across the three types of audiences to resonate with them. The theatre professionals were already aware of the theatre's ethical practices but it would consolidate their loyalty; the 'issues based' audience would become more aware of the theatre's work in giving a voice to the groups/communities they were interested in, perhaps resulting in a longer-term relationship with the theatre venue rather than just the company and finally; the loyal audience would become more conscious of how the artistic risk-taking in terms of what is shown also applies to working practices, again, providing a deeper understanding of the aims of the theatre and a reason for further fidelity and donations. We therefore proposed to make the audience aware of the ethical practices that the theatre engages in by, for example, communicating them on the theatre website, on the tickets and on the theatre premises (box office/café). Providing an account of the ethical practices (for example, the percentage of the price ticket that will be given to the actors) could differentiate the theatre from the larger West End theatres which dominate box office and media attention. In sum, our proposal was the direct result of our work with the variety of stakeholders we engaged with in not just highlighting the tensions between purpose and financial sustainability but in making the purpose central to the theatre's long-term financial sustainability. Ideally, this initiative could be followed by other collaborating organisations developing a network of ethical practices and actors in which the theatre is at the centre.

Further centring on this ethical positioning, another recommendation was to diversify the revenue of the theatre, initiating corporate partnerships by offering space and training to corporations by making use of the issues-based performances and the companies and actors themselves. This idea directly came about as a result of a conversation with a member of the audience who worked for an LGBT+ charity, advising organisations on LGBT+ issues. In discussing his work, we noted how much easier it could be to communicate EDI issues and practices through the storytelling of theatre. We are currently working with the theatre in order to develop this idea further and planning a pilot training away day for a financial organisation in the theatre. We envisage that such partnerships could generate significant revenue for the theatre, make use of the space when it is not in use and, crucially, could further the theatre's ethical positioning within the theatre community as it would provide actors and potentially other theatre professionals with additional income as they would facilitate the training. Ultimately, if implemented, our recommendations should lead to a more sustainable financial base for the theatre, a stronger reputation and strengthened audience loyalty.

Impact making in progress:
We are currently establishing a working relationship with the new leadership team, who are interested in our research and are using it as a tool to implement their strategic plan. This is in part due to our ongoing relationships with some of their stakeholders, namely donors and key loyal audience members.

Principle	Resourcefulness	Obliquity	Caring in action	Illustrative experiences
Stage 1: Imperfect partnership formation				
Progressive Mutual Understanding	There is a need to generate a playful dynamic in which mutual understanding can occur.	Early co-creation is a collaboration in the making with uncertain outcomes. At this stage, it is important to understand and nourish serendipity, *laissez-faire* and humility.	How might we get to know each other and discover our collective capabilities? Actionable recommendations: - Invest some time to volunteer in the community before the study begins. - Gain the support of at least three key decision makers in the community.	Our process was guided by analysing the potential for our key partner to contribute. This exercise was permeated by our understanding of the context/industry and our awareness of the lack of resources within the sector. However, we got the chance to enter into contact with a volunteer leadership fellow who was only temporarily working for the theatre and who found our desire to create something together exciting. This unexpected access allowed us to further 'lean into' the needs of the theatre and the executive team. As we reflect on our experience, we realise the value of a cascade of contacts that progressively gave us a deeper understanding of the theatre's aspirations and gave us ideas about the kind of things we can try and do together. We started with the leadership fellow before developing relationships with the leadership team and different members of staff (including the bar staff, who proved very insightful due to their contact with audiences) before moving onto other stakeholders i.e. audience members, donors, and theatre-makers of all kinds. As we expanded our knowledge of and relationship with the community, the potential project outcomes and impact expanded.
Nurturing Trust and Rapport	Nurturing trust and rapport are processes of collective practice. The researchers must focus on creating a felt community and shared sense of purpose rather than focusing only on transactional meetings.	Establishing frequent interactions within a caring perspective of curiosity. This requires developing empathetic capacities and being adaptable but also asking questions to disrupt taken-for-granted assumptions.	How might we nourish the trust and rapport that we can maintain over the course of our partnerships for impact-making? Actionable recommendations: - Gift the community a service based on their needs, even if it is not directly related to your own research agenda. For example, helping with gaining insights into their	We faced an expertise challenge and saw the need for adaptability in developing our survey. The theatre found our language too academic and wanted the tone to be much more playful. At first, this added extra complexity, moving us away from traditional data collection methods, but in responding and co-creating an interactive quiz on 'what type of theatre goer are you?' we became much closer to the theatre and the leadership team, gaining further understanding of its ethos. In introducing play as an important part of the process, it is likely the number of respondents increased significantly, also providing richer data. In addition, we decided to use our own research resources to offer interviewees drinks at the theatre bar to encourage participation and to demonstrate our commitment to the theatre itself. The social atmosphere, the complicity of the bar staff and the style of communication felt compatible with the theatre's *raison d'etre* and ethos. We also made use of an anonymous mood board where audiences could share their thoughts and feelings about the theatre, these

Principle	Resourcefulness	Obliquity	Caring in action	Illustrative experiences
			market, act as facilitators with stakeholders, support communications objectives, etc. - Attend to how you make other people feel.	opened the door to new thoughts and inspiration that went beyond what was anticipated by the research team. This use of arts-based and fit-for-purpose methodologies not only helped us to get to know our partner and the community but became the creative source for a series of unexpected ideas which would not have been possible otherwise and ended up being the basis of our recommendations for the theatre
Stage 2: Mutual unlearning, reflecting and reframing				
Ethical Positioning and Responsibility	Empathic identification and moral alignment are fundamental to the community's success in generating impact.	A compatible, shared ethical positionality is at the heart of collaborative efforts for impact-making and may require several rounds of discussion to discover.	How might we align the partnership with ethical values and responsibilities? Actionable recommendations: - Involve stakeholders early, consider who is missing. - Incorporate local knowledge and avoid assuming and patronising. - Take the perspective of all stakeholders to ensure understanding of the effects of any potential impact. - Respect diverse perspectives, give voice and celebrate all contributors. - Foster an attitude of radical compassion throughout the project to	The theatre aims to create a better world by providing artistic responses to societal issues and to generate more ethical ways of working in the industry. This was a key motivation for our research partnership as we found commonalities in terms of our moral commitments to the creation of a transformative and accessible artistic scene. We focused our research on these common aims, ensuring access and trust from our partners. An understanding of our ethical responsibilities in engaging with the various stakeholders was thus essential, and we took particular care as we engaged in conversation with other stakeholders in the community, such as audiences and donors, being attentive to some of the broader issues raised that could be painful to discuss (e.g. income, racial/gendered/classed and other social injustices).

Principle	Resourcefulness	Obliquity	Caring in action	Illustrative experiences
			move beyond a rulebook or code of conduct.	
Purpose-Centric Approach	Aligning aspirations and dreams for the future is fundamental. This alignment might include short-term goals such as obtaining funding. Yet, it should go beyond this as well by aspiring to a shared objective that, although not immediately achievable or measurable, can give the community members a purposeful orientation.	Surrendering our attachment to power and moving beyond the dichotomy between partner-centred or researcher-centred approaches, a purpose-centric approach makes space for unexpected possibilities in the collaboration.	How might we make space for a purpose-centric collaboration? ___Actionable recommendations:___ - Co-write a memorandum of understanding. - Visualise the shared purpose through image elicitation methods to interpret and communicate complex/abstract ideas. - Map activities to objectives.	Our interactions with multiple actors in the theatre community resulted in a detailed and intimate portrait of how the desire for a fairer arts sector was taking place at this particular theatre. Our conversations also revealed important ideas in terms of how artistic offerings have a transformative power in terms of heritage making, transforming our accepted ideas of who is included in our cultural heritage. This more nuanced understanding helped us identify which points of tension were most intriguing and promising to work on in the months and years to come. For instance, by immersing ourselves into the shows' socio-cultural contexts and their specific audiences (e.g. LGBTQ+ rights, women's rights, racial injustice, etc.), we started to conceive an agenda for better understanding justice-making through the arts. Within this purpose-driven agenda in mind, we are now conceiving different projects and interventions, some with our current partners and others open for new networks of stakeholders.
Decentralising Power and Re-Balancing Exchanges	A macro-perspective of the larger purpose-driven project is needed by integrating existing and aspirational	Adapt partnership models to changing dynamics and maintaining flexibility is fundamental.	How might we ensure a purpose-driven process capable of decentralising traditional power holders and gatekeepers?	Power dynamics emerged throughout the research process, demonstrating a need to be open-minded and reflective of our own rigidities and vulnerabilities. Ultimately, it was necessary to cede power to our original partner, recognising that they should have power due to the tacit knowledge they have built up over many years. However, it is important to maintain a flexible understanding of the power dynamics in place, as the distribution of power changes when new actors are, for instance,

Principle	Resourcefulness	Obliquity	Caring in action	Illustrative experiences
	initiatives. Making bridges and seeing the collective efforts as part of a larger whole is important. This acknowledgement will allow the community to grow and expand beyond certain powerful institutions or individuals.		Actionable recommendations: - Conduct power mapping to identify where power is concentrated. - Acknowledge positional privilege. - Establish feedback channels and communication rules. - Adopt an obliquity mindset by finding opportunities in unexpected places/actors. - Foster leadership development.	invited on board. We, for instance, also demonstrated how one can decentralise and re-balance power by engaging with other stakeholders, such as donors and reaching out to the new leadership team to extend the project's overall impact. The change in the leadership team was a pivotal learning moment for us to see how interest and excitement can emerge with new stakeholders getting involved. While power imbalances are unavoidable and often uncomfortable – such as when we feel invisible, they are also opportunities to think out of the box to find and connect with other sources of power and resilience that can support our journeys into impact-making. We now see decentralising power as a transversal competency that, if integrated constantly during the evolution of a project, can support the growth of impactful ideas. Sometimes, as in our example of ceding power, this involves the courageous act of researchers humbly realising their lack of expertise.
			Stage 3: *Responsive action and impact evolution*	
Sustainable and Strategic Relationships	Finding long-term opportunities that establish strong affinities with communities. Thus, going beyond one initiative and moving towards a series of interactions and collaborations that will grow and develop in the long term.	Build long-term relationships by reframing setbacks as opportunities; where possible, formalise agreements to secure mutual commitment but do not lose sight of emerging possibilities.	How might we transition from short-term engagements to long-term partnerships? Actionable recommendation: - Take rest when needed in order to reflect (it should be a marathon not a sprint!). - Reframe your perspective. When you step outside of yourself you can open to new	Flexibility and empathy in reflecting on setbacks was necessary throughout the research. Iterative thinking was essential in considering various ways of disseminating the findings to stakeholders, opening the research up to further partners by inviting other theatres to be part of the conversation and including the new executive team. Although the first round of data collection has ended, we now see this project as the beginning of a longer study examining the power of the arts to generate social transformation. We are now following the shows as they move from the incubator of our original partner into the West End (more commercial, mainstream theatre). We have also, for instance, identified other actors within the independent theatre scene in London with which to expand the project in future.

Principle	Resourcefulness	Obliquity	Caring in action	Illustrative experiences
			possibilities and opportunities. - Be open to change – adjust goals, timelines or approaches as circumstances evolve.	
Impact and Outcome-Enhancing Engagement	Impact assessment processes and frameworks should include success criteria prioritising relational, purpose-driven initiatives and long-term social impact alongside more tangible results and short-term achievements and efforts.	Embrace non-linear impact creation, balance short-term gains with the pursuit of long-term impact and be flexible in measuring success.	How might we ensure that our relational engagements nourish 'real' transformative change? <u>Actionable recommendations:</u> - Adapt and iterate based on findings for continuous improvement. - Maximise opportunities by trying new things to multiply impact. - Connect to broader agendas: regional, sectoral or global, for example, the Sustainable Development Goals. - Share ownership of outcomes. - Document lessons learned.	There is a need to be open to different ways of measuring impact but, more significantly, be aware that impact cannot be defined before it is made and that the research process needs to be iterative and dynamic. We had to not only co-learn with our stakeholders, taking on board their expertise, but also encourage co-learning to ensure assumptions about each other and the industry did not harm the engagement. There was also a need to be open to different types of impact – furthermore, as the partnership progresses, the type of impact can change over time. For instance, as a team, we are curious about and open to the future guises of the project as we expand the list of possible existing and new partners.

Table 1: Overview of ROC Dynamic Experience-Based Roadmap for Relational Engagement

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Resourcefulness

Caring in action

Responsive action and impact evolution (long-run)

Mutual unlearning, reflecting and reframing

Imperfect partnership formation

Obliquity