



PDHonline Course G377 (3 PDH)

Charrettes for High Performance Projects

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Charrettes For High Performance Projects

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Adapted from A handbook for Planning and Conducting Charrettes for High-Performance Projects, produced by the United States National Renewable Energy Laboratory, September 2009.

Introduction

The prerequisites for a sustainable and high-performance project design are to:

- Create a vision for the project and set performance goals.
- Form a strong, all-inclusive project team.
- Outline important first steps for the project.



The best way to achieve these prerequisites is through a high-performance charrette. A charrette is an intensive workshop in which various stakeholders and experts are brought together to address a particular issue. Charrettes are ideally suited for large scale complex projects that involve multi-disciplines, regulatory issues, and the involvement of elected officials. However, the process can be used for just about any meeting event. The charrette should result in good communication among project team members and help them develop unified goals.

The purpose of this course is to furnish guidance for planning and conducting a high-performance charrette. The course answers typical questions such as “What is a charrette?” “Why conduct a charrette?” “What topics should we cover?” “Whom should we invite?” and “What happens after the charrette?”

The course presents detailed information for every step of the charrette process, from initial planning, to conducting and facilitating the charrette, to follow-up. It gives recommendations for planning and logistics. It suggests the types of participants to invite, including technical, political, and community representatives, and how best to include key decision makers and stakeholders who can attend only portions of the event. It gives suggestions for the types of expert speakers who can motivate participants and answer their questions. It outlines the characteristics of good facilitators and offers advice for forming effective breakout groups.

This course is literally a step-by-step “how-to” plan to organize and conduct a charrette. And the first step is to understand what a charrette is. Chapter one answers this, and other questions.

Chapter 1

Charrettes for High-Performance Projects

Understanding the difference between a workshop and a charrette and knowing a charrette's expected benefits and outcomes are important first steps in the charrette process. It is also important to determine if the project is sufficiently developed to benefit from a charrette. In this chapter, we answer basic questions about charrettes and give guidance about whether your project is ready for the charrette process.

What Is a Charrette?

A charrette is a creative burst of energy that builds momentum for a project and sets it on a course to meet project goals. It can transform a project from a static, complex problem to a successful, workable plan. Usually, it is an intensely focused, multiday session that uses a collaborative approach to create realistic and achievable goals.

Charrette planners and facilitators use strategic planning to overcome conflict. Part of their strategy is to focus on the big picture and the details of a project to produce collaborative agreement about specific goals, strategies, and project priorities. Charrettes establish trust, build consensus, and help to obtain project approval more quickly by allowing participants to be a part of the decision-making process.

Charrette Benefits

As a project moves from inception to completion, it passes through pre-design, conceptual design, and design development phases. As the design process continues, more decisions are made about the final design (see Figure 1).

Charrette (shar-ette') n. 1. A small cart. 2. A collection of ideas. During the 19th century, students of l'Ecole des Beaux Arts in Paris would ride in the cart sent to retrieve their final art and architecture projects. While en route to the school in the cart, students frantically worked together to complete or improve these projects. The meaning of the word has evolved to imply a collection of ideas or a session of intense brainstorming. 3. An intensely focused activity intended to build consensus among participants, develop specific design goals and solutions for a project, and motivate participants and stakeholders to be committed to reaching those goals. Participants represent all those who can influence the project design decisions.

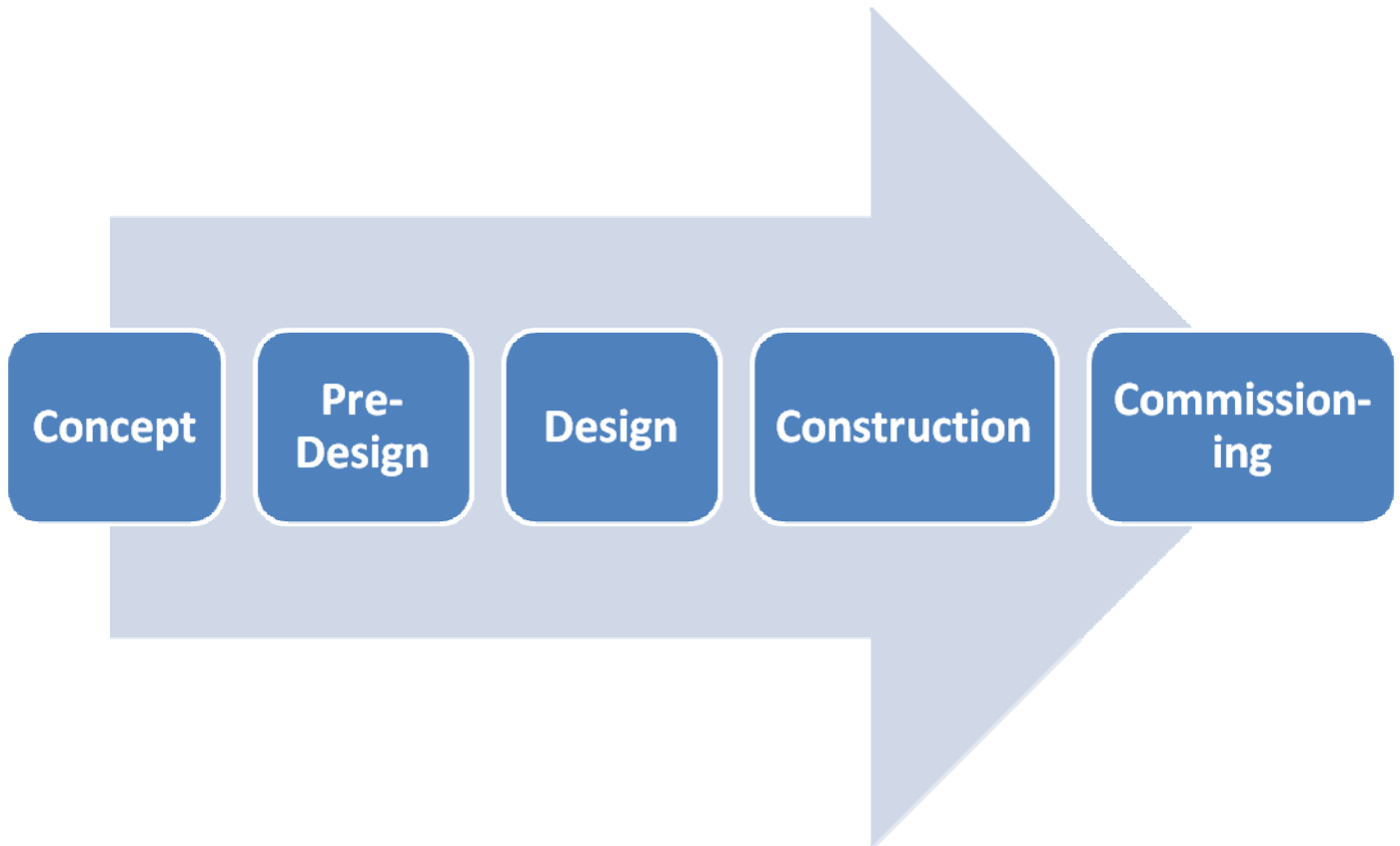


Figure 1

Charrettes are most useful during the pre-design phase. The benefits of using charrettes early in the high-performance design process are many. Most importantly, charrettes can save time and money and improve project performance. In general, charrettes:

- Provide a forum for those who can influence design decisions to meet and begin planning the project.
- Encourage agreement about project goals.
- Kick off the design process.
- Save time and money by soliciting ideas, issues, and concerns for the project design to help avoid later iterative redesign activities.
- Promote enthusiasm for a project and result in early direction for the project outcome.

Conducting a charrette early in the design and decision-making process will:

- Establish a multidisciplinary team that can set and agree about common project goals.
- Develop early consensus about project design priorities.
- Set performance goals.
- Generate quantifiable metrics to measure the final outcomes against the performance goals.
- Provide early understanding of the potential impact of various design strategies.
- Initiate an integrated design process to reduce project costs and schedules and obtain the best performance.
- Identify project strategies to explore with their associated costs, time considerations, and needed expertise to eliminate costly surprises later in the design and construction processes.
- Identify partners, and potential collaborations that can provide expertise, funding, credibility, and support.
- Set a project schedule and budget that all team members feel comfortable following.

What Is a High-Performance Project?

A high-performance project is designed and built to minimize resource consumption, reduce life cycle costs, and maximize performance across a wide range of measures.

Starting the Charrette Planning Process

Ask the following critical questions before beginning the charrette planning process. Understanding where the project stands relative to these issues will increase the likelihood of meeting the overall project goals. Be able to comfortably answer “yes” to these questions before planning the charrette.

- Is the project program developed? The program includes the estimated size of the project, functions, and requirements.

- Has the project requirements been selected or narrowed to a small number of alternatives? Having one or more alternative sites identified will increase the likelihood that participants can work out specific design solutions.
- Are staff members or volunteers available to support the planning and implementation of the event? Planning and organizing a charrette requires considerable staff support for tasks such as developing lists of participants, sending invitations and tracking responses, arranging for a meeting facility and refreshments, working with speakers, and preparing materials.
- Are resources available to support the event? The costs to conduct a charrette can vary widely. You should assume that costs will be incurred. The up-front funds to pay for mailings, photocopying, catering deposits, facility deposits, speaker costs, pre-design analysis, and any other costs associated with preparing for the event must be available or identified when the planning begins.
- Is there an overall “champion” to lead the event? The most effective charrettes have at least one champion to ensure that the overall event schedule and tasks move forward as planned.
- Identify that champion early in the project. The champion should be passionately involved in the project, be able to influence project decisions, and have experience and time with the project.

For large-scale projects are the issues well defined? These issues could include overall master planning, transportation, facilities construction or renovation, O&M, and permitting.

The charrette is intended to engage an interdisciplinary group of professionals in a structured process to identify, evaluate, and recommend strategies for improving the overall performance of a project.

University of North Carolina–Asheville Charrette Saved Time and Money

The University of North Carolina–Asheville (UNCA) used the charrette process with positive results as it decided where the new campus facility would be sited. A one-day charrette saved the university time and money compared to a traditional design approach.

Approximately 40 people from outside and inside the university gathered to discuss the relative merits of three site choices. After a sustainable site issues briefing and several hours of group work, three of the four work groups independently selected an overlap area between the first two sites.

The remaining group recognized the significant advantages of the overlap choice, but preferred the third site. This gave the university the required two choices necessary to take to the university board. Aided by the development costs and the buy-in information from the charrette participants, UNCA quickly settled on the overlap area.

In addition to agreeing about the site for the project, which was the focus of the charrette, UNCA now has a good understanding of the third site sustainable development options and costs for future considerations.

The next chapter begins the charrette process with planning, including forming a steering committee, holding a kickoff meeting, and setting up the meeting.

Chapter 2 Getting Started

Initial decisions about the key issues, participants, and the best dates and locations are made during the first stages of the charrette planning process. This chapter gives suggestions for how to begin this planning process.

Create a Steering Committee

The first step in planning and organizing a charrette is to set up a *steering committee* to guide the planning process and ensure support from key individuals and organizations. Discussing the objectives and logistical issues with several enthusiastic and dedicated people will help generate ideas and ensure a successful event.

A group of five to eight individuals working closely together will enhance the efficiency of the planning process. In general, effective steering committee members:

- Represent a variety of interests:
 - Owner and/or owner's representative
 - Charrette organizers
 - Overall facilitator
 - Local community leader
 - High-profile stakeholder
 - Overall project champion.
- Demonstrate good organizational skills.
- Encourage and accept new ideas.
- Identify and engage potential participants, partners, and speakers.

Anyone who will have an important role in planning, organizing, and managing the charrette should attend the steering committee meetings. This includes those making logistical arrangements and preparing participant packets, as well as those designing the agenda and identifying participants and speakers. As the event nears, additional people can be invited to the

At least three months before the event . . .

- Create a steering committee.
- Hold a kickoff meeting.
- Determine the date and location.

steering committee meetings so they can hear firsthand the decisions that are made and report on their efforts.

Hold a Kickoff Meeting

Hold a kickoff meeting to assemble the steering committee and begin the planning process.

A kickoff meeting is important for defining the roles of each steering committee member and for focusing on the tasks that need to be accomplished.

The steering committee members can meet for the kickoff meeting in person, by conference call, or by videoconference. Typically, kickoff meetings will last one to two hours. Use the kickoff meeting to begin shaping the event, not to make final detailed decisions. Ask all steering committee members to review the checklist for planning and conducting charrettes for high-performance projects before the kickoff meeting. During the kickoff meeting, be sure to discuss:



- Purpose
- Type and length
- Resulting products
- Agenda
- Location
- Date
- Resources to cover or defray costs
- Participants
- Motivational and educational speakers
- Facilitators to lead the charrette and breakout groups
- Partners to supply resources or buy in to the charrette process and its results, or both

- Project information for participants
- Date, time, and logistics of the next steering committee meeting.

At the beginning of the meeting, designate a steering committee member to record the discussion, prepare meeting minutes, and distribute the minutes to all steering committee members. End the kickoff meeting with a review of action items. Include in the minutes an overview of the discussions of the topics listed above and described in more detail below.

Purpose

Carefully identify the purpose of the event and the characteristics and expertise of participants needed to achieve that goal. The purpose will affect the format, along with all other decisions made during the planning process. A good understanding of the intended outcome and participant characteristics will improve the likelihood of a successful event and promote a sentiment that participation was worthwhile.

Type and Length

The charrette includes two major elements: an educational component (workshop) and an interactive planning component (collaborative exercises and optional breakout groups). Refer to Figure 2 and Table 1 to identify the purpose and type of event most appropriate for a particular project.

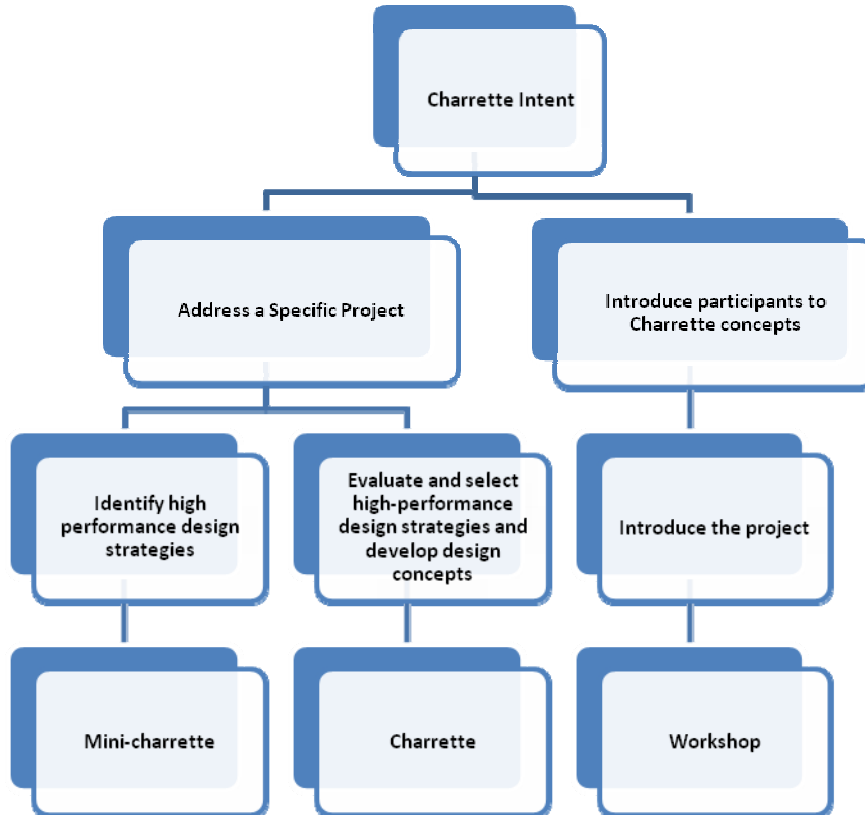


Figure 2

Table 1
Summary of Charrettes for High-Performance Projects

| Event Type | Description | Length | Purpose |
|------------|---|--------|--|
| Workshop | Large-group presentations and discussions | ½ day | <ul style="list-style-type: none"> • Introduce participants with limited time to high-performance design concepts and strategies. • Introduce participants to the charrette process and engage them in “practice” charrette exercises. • Conduct a low-cost, workshop-only event. |

| | | | |
|----------------------|--|----------------|--|
| Mini-Charrette | Workshop plus interactive exercises | 1 to 1½ days | <ul style="list-style-type: none">• Provide basic training in high-performance design topics and present the results of the redesign energy analysis (conduct in workshop format).• Encourage “buy in” acceptance for the project, generate enthusiasm, and develop promotional materials.• Set performance goals.• Identify high-performance design strategies and technologies appropriate for the project (conduct in breakout groups). |
| Full-Scale Charrette | Workshop plus intensive breakout group discussions | 2 or more days | <ul style="list-style-type: none">• Provide basic training in high-performance design topics (conduct in workshop format).• Encourage “buy in” acceptance for the project, generate enthusiasm, and develop promotional materials.• Set performance goals.• Identify high-performance design strategies and technologies appropriate for the project (conduct in breakout groups).• Develop designs based on the selected strategies and technologies (conduct in breakout groups).• Evaluate and select one or more designs to be developed into the project construction plans. |

Resulting Products

As you discuss the purpose and type of the event, also address its desired outcomes. Make sure these desired results are achievable within set budget constraints, the proposed participants' levels of expertise, and the amount of detailed information available about the project.

The following list describes suggested reports to generate as end products for each event type.

- **Workshop** – A short summary of the presentations and discussions that took place during the workshop and recommendations for the next steps agreed to by participants.
- **Mini-charrette** – A summary of the background information provided to the participants, including:
 - Results of the pre-design analysis
 - A summary of the large group discussions and information presented in a workshop format
 - Recommended strategies to consider for the specific project
 - Agreed-upon performance goals
 - Suggested follow-up activities.
- **Full-scale charrette** – A summary of the background information provided to the participants, including:
 - Results of the pre-design analysis
 - A detailed summary of the large-group discussions, information presented in a workshop format and individual breakout group recommendations
 - A detailed summary of the specific strategies that will be included in the project design and estimated energy and resource savings or performance benefits
 - Sketches and drawings to be incorporated into the project construction plans
 - Agreed-upon performance goals
 - Suggested follow-up activities.

Agenda

The agenda depends on the type of event you select. Chapter 3 gives more information about the agenda. The steering committee members may also offer optional activities. For example:

- Hold a reception the first or second evening of the mini-charrette or the full-scale charrette. This gives participants an opportunity to network and may include local dignitaries and community groups.
- If appropriate for the type of project, conduct a tour of the project site before the mini-charrette or full-scale charrette.

Location

Hold the charrette at an easily accessible location such as near a major airport. After selecting a location, identify potential facilities for the event. Table 2 lists the requirements of potential facilities.

**Table 2
Minimum Facility Requirements**

| Requirement | Workshop | Mini-charrette | Full-Scale Charrette |
|--|----------|----------------|----------------------|
| Large room that can accommodate the potential number of participants (usually 25 to 50 people) in a classroom- or auditorium-style configuration, or at tables for 6 to 8 people. | ✓ | ✓ | ✓ |
| Small rooms for breakout group sessions or large room that can accommodate multiple breakout groups. Breakout groups usually require a large round table for six to eight people, flip charts, and wall space for hanging flip chart pages and sketches. | | ✓ | ✓ |
| Space for resource table/library (documents, software, and other resources that may be useful to the participants during the event). | | ✓ | ✓ |
| Optional—space for a registration table, food and beverages, event reception, exhibits, Internet and fax services, or other special needs. | ✓ | ✓ | ✓ |

Date

Discuss potential event dates during the kickoff meeting and commit to finalizing the date soon. Many of the essential tasks to plan a charrette can be completed only after the event date is established. Consider the following when selecting an event date:

- Allow enough time to plan the event, contact participants, make logistical arrangements, ensure that participants are not already too scheduled to attend, and prepare background information for participants. We recommend scheduling the event date no sooner than three months after the kickoff meeting.
- Investigate potential conflicts such as holidays or other events and conferences that could make it difficult to draw participants to the charrette.

- Investigate opportunities for coordinating the charrette in conjunction with related events to increase interest.
- Confirm the availability of key participants, speakers, and facilitators before selecting the final date.
- Schedule the event so that the project design process can continue to move forward. For example, consider scheduling briefings for elected officials, regulators, meetings with funding sources, development and issuance of a Request for Proposal (RFP) to select an architectural/ engineering firm, and ongoing meetings with the community soon after the charrette.

Resources To Cover or Defray Costs

Use the kickoff meeting to begin discussing the event budget and costs that will be incurred. Begin identifying who will be responsible for those costs. Finalize an event budget shortly after the kickoff meeting.

Potential costs to conduct the event include:

- Steering committee time and travel
- Mailings (flyers, e-mails, invitation letters)
- Charrette materials and reproduction
- Speakers' and facilitators' time and travel
- Pre-design analysis
- Staffing support for the event
- Photographers and writers
- Facility rental
- Food
- Audiovisual (AV) equipment

- Internet connection at the facility
- Final charrette report and follow-up with participants.

Participants

Plan to invite 25 to 50 people to participate in a mini-charrette or full-scale charrette. Having more than 50 participants results in a larger than optimum number of people assigned to each breakout group or additional breakout groups. Both cases increase the reporting time, the time needed to complete the charrette, and the potential that less-assertive breakout group members will refrain from participating in breakout group discussions. Fewer than 25 participants will result in fewer than three breakout groups or breakout groups with fewer than six to eight members. Either case reduces the highly charged exchanges that are usually found with groups of 25 to 50 participants. Invite more than 50 participants to a workshop only if the steering committee feels comfortable that an effective workshop can be conducted with a larger number of participants.

Figure 3, on the next page, identifies several types of participants we recommend inviting to a charrette. During the kickoff meeting, settle on the approximate number of participants to invite in each category. If possible, identify specific participants. Plan to complete a list of invitees (name, affiliation, address, phone, fax, and e-mail) soon after the kickoff meeting.

Motivational and Educational Speakers

An assortment of speakers representing a variety of expertise will increase the effectiveness of the workshop. Good presenters motivate the participants and impart valuable information that the participants can apply during the charrette activities and other high-performance projects. Consider inviting the following types of speakers:

Planning tip:

The ideal mix of speakers is a combination of national and local experts.

- Kickoff speaker to energize and excite participants
- Local dignitaries to demonstrate support
- Project owner or project representative to explain the project and goals for the charrette
- Content experts for specific topics to be addressed
- Case study speakers to share previous experience gained from actual projects.

Identify potential speakers during the kickoff meeting, as well as other people who may be able to recommend additional speakers for specific categories (if the steering committee members are not familiar with quality speakers in specific areas). Contact potential speakers early to verify that they are interested in participating and that the proposed dates fit their schedules. Be sure to communicate the costs they may be asked to cover for their participation.

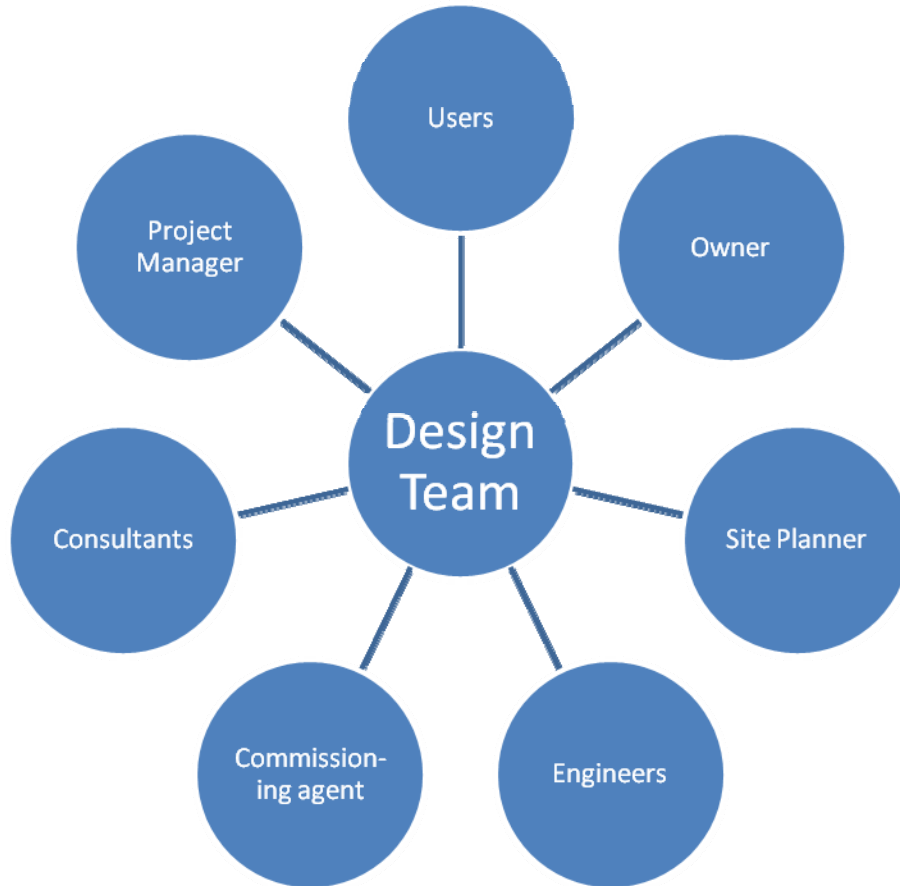


Figure 3

Facilitators to Lead the Charrette and Breakout Groups

Good facilitators keep the group motivated and encourage participant involvement in the discussions. They foster a sense of openness and inclusion for all group members by keeping the momentum going.

Identify potential facilitators during the kickoff meeting. An overall facilitator leads the event and ensures the desired results are achieved. Breakout group facilitators perform similar functions during the breakout group discussions.

Planning tip:

Assign the content experts recruited as speakers to serve as breakout group facilitators; however, be sure they have the skills to facilitate.

The success of the event depends almost entirely on the overall facilitator's ability to motivate the participants and keep the charrette on track. Obtain recommendations for facilitators from trusted colleagues. Select an overall facilitator who:

- Is skilled and practiced at leading group discussions and, preferably, has experience facilitating charrettes.
- Has demonstrated skill in encouraging constructive contributions from all participants and adhering to the agenda to ensure participants and organizers are satisfied with the results.
- Has a good understanding of the high-performance design process.

Contact potential facilitators soon to verify that they are interested in participating and that the proposed dates fit within their schedules. Integrate the facilitators as members of the steering committee immediately after obtaining their commitment. Their experience will prove valuable during the planning process.

Partners To Supply Resources or Buy in to the Charrette Process, or Both

Identify potential partners who could add to the charrette experience through needed expertise, credibility, funding, or support. These partners may be able to furnish monetary, product, or service donations to defray some of the costs. For example, find a partner to pay for a lunch or for a pre- or post-charrette reception.

Partners bring new perspectives or expertise to the project, particularly if the local community is involved. A well-connected steering committee will know who the potential partners are in the local area. They are also likely to have individual contacts within these organizations.

Project Information for Participants

Providing sufficient information to help charrette participants become familiar with the project will allow more time during the charrette to discuss project design solutions (less time will be required to describe the project). It will also help the participants refine the design strategies they recommend while taking part in the charrette activities.

Date, Time, and Logistics of the Next Steering Committee Meeting



At the conclusion of the kickoff meeting, set the date and time for the next steering committee meeting and assign a steering committee member to make logistical arrangements for the meeting (e.g., reserve a conference room or obtain a call-in number for a conference call). We also recommend that the steering committee set a schedule and make logistical arrangements for regular meetings throughout the entire planning period.

Review of Kickoff Meeting Action Items

Conclude the kickoff meeting by reviewing the action items that resulted from the discussion. Be sure there is a clear outcome for each action item, a date when each action item is to be completed, and a steering committee member assigned to complete each action. Assigning responsibility for actions will ensure progress is made quickly on key decisions such as the date, location, and speakers. Discuss the status of the action items at the beginning of the next steering committee meeting.

Determine Event Date and Location

After the kickoff meeting, the steering committee members must act quickly to make the key decisions. Subsequent event planning cannot be completed until these important actions are done. At a minimum, complete the following within two weeks after the kickoff meeting:

- Finalize the event date and location.
- Reach agreement on a preliminary agenda.
- Identify and contact key facilitators and speakers.

Remember, the makeup of the steering committee, the decisions they make during the kickoff meeting, and the dates and location will significantly affect the event's outcome. A carefully selected steering committee and well-executed kickoff meeting will set the stage for a successful event.

Chapter 3

Planning and Developing the Charrette

This chapter covers the details of the charrette planning process. Charrettes can take more time, planning, and resources to organize than most people realize. Be sure to carefully review the sections in this chapter to avoid problems during the charrette.

Develop an Agenda

Develop an agenda to meet the specific needs of the event. Clearly state the goals at the top of the agenda. Developing the goals and agenda together will help the steering committee members identify their common objectives. Later, when the agenda is distributed to participants, stating the goals will help the participants better understand the purpose of the event. Although the agenda should be tailored carefully to meet the goals of the charrette, we discuss in the following sections the elements that should be included.

Welcome and Introductions

The first item on the agenda is to welcome the participants, make general announcements such as the location of the restrooms, and thank sponsors and partners. The overall facilitator generally thanks the participants for their interest, introduces VIPs, and asks the participants to introduce themselves. Following the introductions, the facilitator should review expectations and goals.

Keynote Speech

Although a keynote speech is not necessary, a good speaker can motivate the participants and help them understand why their work is important. The speaker should energize and excite the participants. Generally, he or she should speak immediately after the opening formalities. The presentation will capture the participants' interest and encourage them to actively participate. If

Two to three months before the event . . .

- Develop an agenda.
- Confirm availability of key players.
- Confirm arrangements with the speakers.
- Invite participants and track responses.
- Provide all information for the pre-design energy analysis.
- Finalize budget, expenditures, and resources.
- Make logistical arrangements.
- Assemble and distribute participant and resource materials.
- Develop evaluation forms.
- Arrange for continuing education units.

Consider a pre-charrette survey.

local dignitaries or VIPs are present, give them an opportunity early on the agenda to show their support.

Project Overview

The owner or owner's representative should present a clear, concise overview of the project. This presentation should include the project goals and vision, status (what decisions have been made), issues and problems, and specific objectives or questions to be addressed. Reviewing the owner's presentation in draft form to ensure that appropriate material is covered in an appropriate level of

Planning tip:

Allow sufficient time for participants to introduce themselves, as networking is a benefit of a charrette. If the number of participants is large or the time is limited, ask for a show of hands of participants representing various types of expertise instead of having people introduce themselves individually.

detail is a good idea. Encourage the owner to establish a tone of openness and receptiveness to the ideas and suggestions generated at the event.

Technical Presentations

The first technical presentation should be an overview of the findings from any pre-design analysis. The content experts present next. These are the technical experts in areas relevant to high-performance design and the specific project. It is helpful if these speakers illustrate the successful

applications of the topics presented through case study examples. Case studies prove that the concepts presented really do work and make it more likely that the participants will consider these concepts later during the charrette exercises or on their own projects.

Carefully balance the number and length of presentations. Give the speakers adequate time to present good information but not so much time that participants lose interest. Allow time for questions and discussions after each presentation.

Breakout Groups and Reporting

Mini-charrette and full-scale charrette agendas include multiple breakout group discussions and large-group reporting sessions. At the conclusion of these sessions, or after the technical presentations during a workshop, conclude by reviewing the purpose of the event, making suggestions for next steps, and thanking the participants for attending.

Planning tip:

VIPs are generally given short time slots on the agenda so the event can continue if they cannot attend. If a VIP is expected to make a lengthy address, plan an alternative such as a stand-in speaker, video or additional discussion time, in case the speaker cannot attend.

Confirm Availability of Key Players

Facilitators

Chapter 2 gave general guidance to help the steering committee identify potential facilitators. We also emphasized the importance of gaining commitment from these people early in the planning process. In addition to the characteristics of a good facilitator, the overall facilitator must be qualified to emcee the event. This person:



- Introduces speakers.
- Handles transitions between presentations.
- Ensures that speakers and breakout groups stay on schedule.
- Facilitates question-and-answer sessions.
- Refocuses the participants after breaks and lunch.
- Possesses good group process skills as well as an understanding of the subject matter.

The overall facilitator may also be responsible for describing the goals and wrapping up the event.

Breakout group facilitators should have similar qualifications as the overall facilitator, in terms of guiding discussion groups, along with expertise in the subject matter of their breakout groups. In addition to leading breakout group discussions and encouraging full participation from all breakout group members, these facilitators should also be subject experts in high-performance design or the specific topic addressed by the breakout group.

Speakers

As soon as the steering committee agrees about potential speakers, contact them and obtain commitments for participating in the event.

VIPs

Inviting VIPs to participate in all or key parts of a charrette has two primary benefits:

1. VIPs demonstrate support for the event and the project by making time in their schedules to participate, and
2. VIPs develop a personal commitment to seeing a successful end to the project.

Don't include too many VIP speakers—they can slow the momentum of the group and delay “getting down to work.”

Confirm Arrangements with the Speakers

Ask the speakers to supply a list of required AV equipment and special supplies or inform them about the available equipment and supplies. Speakers sometimes prefer to bring their own equipment. If this is the case, be sure the facility and event staff can accommodate and operate their equipment. For example, be sure that the speaker's laptop computer is compatible with the available video projector.

Encourage the speakers to submit their presentation materials before the event. If the steering committee has not seen invited speakers present similar material, ask to see a draft of their presentations. Having the final presentations before the event allows enough time for the electronic presentations from all the speakers to be loaded onto one computer. This eliminates the time otherwise needed during the event to transfer computers or load presentations. Also, the presentations can be printed, copied, and included in the participant packages.

Determine whether the speakers plan to bring additional handouts or resource materials. If so, encourage them to bring enough for all participants (provide an accurate count) or submit the handout materials with enough time before the event to reproduce the materials and include them in the participant packages.

Request that the speakers furnish travel information, including flight itineraries and hotel accommodations, so they can be contacted in an emergency or if they fail to appear on schedule.

Invite Participants and Track Responses

Finalize the participant invitation list, including contact information (name, title, company, address, phone, and e-mail address) for each invitee.

Send a “save the date” announcement as soon as possible after finalizing the invitee list, approximately two

Planning tip:

VIPs generally require as much advance notice of the event date and time as possible. They may not confirm their participation until just before the event.

months before the event date. This announcement gives invitees a heads up about the event and encourages them to include it in their schedules.

Formally invite the participants after sending a save the date announcement. Include in the invitation letter: Clear, concise statement of the event's purpose, anticipated event outcomes, description of the invitee's role, summary information, registration or RSVP form, and logistical information.

Provide enough information in the invitation to stimulate the invitees to participate, but do not provide too much detail at this point. The invitation package should include:

- Summary information such as, a brief description of the project, including background and site information, a preliminary agenda, a list of speakers and facilitators, a list of invitees, the cost to participate in the event, and instructions for submitting the registration fee.
- A registration or RSVP form should be included with: Date that the form must be returned (two to three weeks before the event), procedure for returning the RSVP form (e.g., on-line registration on a Web site, e-mail and mail addresses, and/or fax and phone numbers), responder's contact information (to be filled in by responder), responder's dietary preferences (if meals are to be provided), responder's area of expertise (optional), responder's level of experience with high-performance design (optional), and form of payment, if there is a charge to participate in the event.
- And finally, the logistical information. This information may be distributed later to those who express interest in attending the event. This should include:
 - Logistical information
 - Hotel information, including reservation number, group name, and rates
 - Map to the meeting facility
 - Parking options
 - Forms of public transportation available to the meeting facility, including suggested lines and stops
 - Designated entrance to use at the meeting facility
 - Security requirements, if there is controlled access to the facility
 - Emergency contact information (e.g., facility telephone number) for reaching the participants during the event.
- Whether meals are to be provided or where to go for meals

- Supplies and resources
 - Those that will be available during the event
 - Those that the participants may want to bring.
- Additional information
 - Points of interest, scheduled or optional nearby building tours.

Develop a tracking system to record and monitor the RSVPs. Tracking responses helps the steering committee members ensure a diversity of expertise is represented. Invite additional participants in a timely manner when key people on the original invitee list respond that they are unable to attend the event.

Require that all those interested in attending the event register or RSVP so the steering committee will know how many participants to expect. It may be necessary to cut off registration after a specified participant number and notify the remaining interested people that the event is full.

Finalize Budget, Expenditures, and Resources

Finalize the budget and determine whether the participants will need to pay to attend. You may need to charge a small fee to cover the cost of snacks and meals or to mail materials to the participants.

Follow up with the potential partners identified during the kickoff meeting. Obtain commitments from these partners early in the planning process to defray specific costs.

Knowing at the outset what contributions to expect will enable the steering committee to more accurately estimate the out-of-pocket event expenses and determine whether to charge a registration fee.

Planning tip:

Multiple communications are likely to be sent to invitees and participants. To save time and effort, create a mail-merge system for hardcopy mailings and a group e-mail list for electronic communications. Also, maintain an electronic record of invitee names, contact information, RSVP responses, dietary requests, and special information to make it easier to track changes, add and remove names, and forward the record to other steering committee members.

Make Logistical Arrangements

Facility

In addition to the general facility information addressed during the kickoff meeting:

- Tour the proposed facilities to determine suitability and evaluate:
 - Meeting room configurations
 - Meeting room acoustics
 - Ability for participants to easily see and hear the presenters
 - Locations for resource tables, registration areas, and food or beverage tables
 - Table size and shape for breakout group activities
 - Wall space for hanging flip chart pages and drawings.
- Evaluate the ease of access to the facility, such as transportation, security, and convenience.
- Determine if the guest lodging options are acceptable.
- Evaluate the dining and catering options.
- Fully understand and be comfortable with all contract requirements, including the cancellation clause, before committing to pay for a meeting facility.
- Ensure that the space is available after hours (e.g., evenings and weekends) if sessions are to be conducted during these times.
 - Verify that lighting, ventilation, heating, and air-conditioning are available during these times.
 - If access to the building will be restricted, clarify the access arrangements.
- Determine if the facility staff will need a list of participants before or on the day of the event to facilitate entry or parking.
- Be sure the facility is NOT under renovation during the event.



Food

Serve refreshments to help the participants stay energized during the event. Offer healthy food and beverages such as:

- Morning—juice, water, bagels, yogurt, and fresh fruit.
- Afternoon—water, juice, soda, fresh fruit, cookies, or protein bars.

Planning tip:

If lunch is to be served during the event, be sure to include a way to indicate dietary restrictions or preferences on the RSVP form. It is a good idea to provide vegetarian meals as an option, even if none of the participants indicate a preference.

Serving lunch during the mini-charrette and full-scale charrette or before or after a half-day workshop provides an opportunity for networking, visiting exhibits, continued breakout group discussions, and touring other breakout group areas. Generally, a 30-minute lunch break is sufficient if lunch is provided. Otherwise, participants will usually need an hour or more to go out for lunch.

Big Versus Small

Which is better? Conducting a mini-charrette or full-scale charrette in one room large enough to hold as many breakout tables as needed, or holding the breakout sessions in small, individual rooms? Holding breakout group sessions in one large room can promote spontaneous communication between the breakout groups. However, the noise level may be too high for members of individual breakout groups to easily communicate and there may not be sufficient wall space for each breakout group to post flip chart pages and drawings. On the other hand, renting many small meeting rooms may isolate and reduce beneficial interactions between groups and exceed the event budget. In all cases, keep in mind that participants need enough space around breakout groups to spread out the materials they are using and to have a good acoustic level in which to conduct discussions.

Typically, participants are anxious for a change of scenery and want to leave the event for dinner. Near the end of the day, discuss dining options to give the participants an opportunity to informally form their own dinner groups.

Consider holding an opening reception the evening before (or during) the mini-charrette or full-scale charrette to introduce participants and encourage informal interaction with the presenters.

This type of reception usually begins right after business hours and lasts for a couple hours. If you are serving food, offer appetizers and beverages.

Lodging

Arrange for a block of rooms at a convenient hotel if participants are traveling from out of town. You may be able to obtain a reduced conference or group rate. Periodically check with the hotel to track registrations. You may need to contact key participants, particularly speakers and facilitators, to remind them to secure their reservations.

Staffing

Successful events depend on the skill of staff people assigned to take charge of or assist with specific duties. The number of staff people needed to complete these duties depends on the size of the event. Table 3 summarizes some of the important activities staff people perform during the event.

In addition to the suggested staff support, keep these recommendations in mind when planning the event: Assign more than one person to help with registration to ensure an efficient process, and allow the logistics person to focus on logistics. If this person has other duties, an important logistics-related detail will likely not go as planned.

| Table 3 Event Staff Support Summary | |
|--|--|
| Duty | Description |
| Logistics person | <ul style="list-style-type: none">• Oversees participant registration.• Ensures that refreshments and meals are served on time and when the overall facilitator expects them (may need to adjust serving times during the event according to the facilitator’s direction).• Maintains communication with facility staff about meeting room comfort (e.g., temperature and lighting).• Makes certain that AV equipment is available when needed.• Runs errands. |

| | |
|-----------------------|--|
| AV equipment operator | <ul style="list-style-type: none">• Sets up presentations.• Operates AV equipment (must be able to troubleshoot and solve equipment operation problems). |
| Photographer | <ul style="list-style-type: none">• Documents the event with photos. Needs to be sure to capture any sketches and diagrams generated by the breakout groups. |
| Writer | <ul style="list-style-type: none">• Takes detailed notes during the event. Often good to have one writer or scribe (in addition to a facilitator) for each breakout group.• Completes a written report following the event. |

It is best to always assume there will be some type of equipment glitch and be prepared to handle it.

Arrange for a professional photographer or assign someone skilled at using cameras to take photos throughout the event; explain to the photographer how the pictures will be used so that he or she will take the needed shots. For example, the final report might include photos of key speakers, breakout groups at work, breakout groups reporting, and the tour of the project.

Before the event, assign someone to take notes. Brief this person about the importance of thorough recording. Preferably, this person has some subject matter expertise.

The report writer should be given an outline of the anticipated report before the event and should have an opportunity to review examples of charrette reports that most closely resemble the anticipated outcome.

Planning tip:

Invite public relations professionals or journalists to attend part or the entire event, including presentations and breakout group sessions. The potential publicity can be very useful in developing broad support for the project, raising project funds, and fostering public acceptance.

Equipment and Supplies

Begin identifying the AV equipment and meeting supplies that will be needed early in the planning process. Determine the number needed and the cost to buy or rent each item. If possible, make a set of the meeting supplies available to each breakout group in addition to the overall facilitator. Typical AV equipment and meeting supplies are shown below in Table 4.

Table 4
Audio-Visual and Meeting Supplies

| AV Equipment | Meeting Supplies |
|--|---|
| <ul style="list-style-type: none">➤ Wireless lapel microphone➤ Wireless handheld microphone➤ Video projector➤ Transparency projector (if needed)➤ Projection screen➤ Laser pointer➤ Electrical extension cords➤ Power strips➤ Laptop computer loaded with presentations➤ USB thumb drive for last-minute transfer of presentations➤ Wireless or wired Internet access➤ Laptop computers for resource table (optional) | <ul style="list-style-type: none">➤ Flip chart note pads and easels (one per breakout group and one more for overall group)➤ Rolls of masking tape or tacks for each group, depending on the surface to which flip chart pages will be attached➤ Drafting tape➤ Markers (variety of dark colors for easy visibility)➤ Drawing pens (thick for easy visibility)➤ Rolls of architectural tracing paper➤ Graph paper➤ Architectural and engineering drawing scales➤ Pads of medium-sized sticky notes➤ Blank overhead transparencies (optional) and markers➤ Duct tape (to tape electrical cords to the floor)➤ Tubes or flat portfolios to store and carry charrette flip chart pages and drawings➤ Sets of project drawings (e.g., site plans and aerial photos) |

Arrange to have materials and supplies shipped to the facility a few days before the event. If notified in advance, most hotels will hold materials for future meetings if the boxes are clearly marked with the responsible person's name, event name, and event date.

Signs and Name Tags

Prepare the needed number of signs to direct participants to the meeting room. Signs are especially important if the facility is large or has a confusing configuration. Also, place a sign outside the meeting room at the registration table. Use easels to hold all signs so that they can be placed in easy-to-find locations.

Prepare name tags for participants and speakers. Use a large, legible font to print each person's first name. Print the person's last name and affiliation in smaller font. The large font should be no smaller than 30 points.

Exhibits

An exhibitor area is optional. Discuss expectations with exhibitors so there is no confusion about the number of participants and their available time to interact with the exhibitors during the event. Invite participants to visit exhibitors during lunch, breaks, an opening reception, or other designated periods.

Assemble and Distribute Participant and Resource Materials

Prepare and assemble participant packages to be distributed when the participants check in at the registration table with the following suggested contents:

- Tab 1: Event-specific information
 - Final agenda
 - List of sponsors and contact information
 - List of participants and contact information
 - List of presenters with bios and contact information
 - List of exhibitors
- Tab 2: Project information
- Tab 3: Pre-design energy analysis results
- Tab 4: Presentations printed as handouts for each technical presentation
- Tab 5: Case studies of similar high-performance projects

Planning tip:

Leave plenty of time to make arrangements for obtaining equipment and supplies. Some items, such as AV equipment, will likely need to be reserved in advance.

- Tab 6: Resources
- Tab 7: Evaluation form.

Mini-charrette and full-scale charrette participants will find it helpful to have some of this material before the event. For example, distribute the project information and pre-design analysis results at least two weeks before the charrette, if possible. Also, include this material in the participant packages.

Assembling the packages is time consuming, so plan to assemble them at least one week before the event. If they must be assembled just before the event, allow several hours and recruit volunteers to help. After assembly, check random samples to make sure all materials are included in the proper order.

Decide if notebooks or folders will be used, based on the quantity of materials. Personalize the materials with a label containing the charrette title and date and an attractive graphic affixed to the notebook or folder cover.

Set up a resource table to showcase examples of print and electronic resources, particularly local resources. Provide participants information about how to order the resources. The resources may be useful during the charrette.

Develop Evaluation Forms

Participant evaluations can be extremely useful to event planners and to the project team. Provide evaluation forms (Appendix H) in the participant packages, and prepare a box where participants can place their completed evaluation forms. Use the comments to improve future events and to identify kudos or concerns.

Arrange for Continuing Education Units

The training may qualify participants for continuing education units (CEUs). Offering CEUs may help draw participants to the event; however, this does involve extra work for the organizers. The steering committee members should decide early in the planning process if the benefits are worth the time, and sometimes the cost, of arranging to offer CEUs.

Many professional organizations have processes and procedures in place for applying to become a CEU host. These processes vary among the organizations. Contact the national offices of the organization from which the CEUs are to be granted to obtain the appropriate procedure.

Consider a Pre-charrette Survey

Often critical decision points are identified in advance of the charrette. Providing an online survey such as SurveyMonkey.com can generate useful information about participant opinions and interests that can be included in the project information package. The survey results can be useful for goal setting and can help to get participants excited about the upcoming event.

Be environmentally friendly and lead by example

- Employ green practices when preparing participant materials:
- Use recycled paper.
- Make double-sided copies of everything except site information and other charrette working materials.
- Use notebooks or folders made of recycled or environmentally preferable materials.
- Avoid using paper when possible:
 - Give Web site addresses and information about how to order materials instead of providing all the materials.
 - Make examples of supplemental materials such as brochures and flyers available at the resource table.
 - Distribute advance materials electronically by e-mail or Web site.
- Collect name tags for use at the next event.
- Provide recycling bins for paper, cans, bottles, and composting.

Chapter 4

Conducting the Charrette

This chapter gives guidance about how to manage a successful charrette. Included are lessons learned and useful tips for reaching concept and project consensus.

The Day before the Event

Visit the Facility

Visit the facility to check the room setup and confirm all arrangements with facility staff to avoid surprises. Confirm as many of the following as possible (some might not be possible until the morning of the event):

- The signage directing the participants to the appropriate meeting room is placed.
- All reserved equipment is available.
- The AV equipment is operating properly and any special operation requirements are clarified.
- All presentations can be opened and projected and are clear, bright, and visible.
- The room is laid out properly for seating, breakout groups, resource table, refreshments, and registration.
- The planned arrival of refreshments and lunch coincides with scheduled breaks on the agenda.

Check Supplies and Participant Materials

Check with those responsible to be sure all logistical requirements have been addressed (Chapter 3). Make sure they are prepared to handle last-minute logistical requests. For example:

The day before the event . . .

- Visit the facility.
- Check supplies and participant materials.
- Meet with the facilitator and the speakers.

The day of the event . . .

- Verify logistical arrangements.
- Set the stage with the opening session.
- Describe project and charrette expectations.
- Create effective breakout groups.
- Implement successful charrette practices.
- Set performance goals.

- Locate the nearest photocopy shop (hotel copy services are often quite expensive).
- Locate the nearest office supply store.
- Locate all the materials that were shipped to the meeting and ensure all materials arrived as anticipated.

Meet With Facilitators and Speakers

Meet with all facilitators and speakers the evening before the event if possible, to make sure everyone has arrived, has the needed materials, and is prepared for the event. This meeting gives the facilitators and speakers an opportunity to meet one another, which will help the event flow more smoothly. At the meeting:

- Review the agenda and the roles and responsibilities of each facilitator and speaker.
- Give each facilitator and speaker a participant package so they can familiarize themselves with these materials before the event begins.

The Day of the Event

Verify Logistical Arrangements

Arrive at the event facility at least one hour before event registration starts. With the help of the event staff and other recruited volunteers, ensure:

- The registration table is set up:
 - Alphabetize name tags to enable staff members to find participants' names as they arrive,
 - Place the participant packages so they are easy to reach for those working at the registration table (or set them on each chair or table in the meeting room),
 - Have at least two people at the registration table until the event begins. After the event begins, at least one person should stay at the table for an additional 30 minutes, or until all participants have registered.
- The meeting room is arranged properly:

Planning tip:

Give a list of all participants to guards, receptionists, parking lot attendants, and other gatekeepers on the day of the event. Be aware that security requirements have become more stringent; you may need to inform participants to bring more than one type of identification.

- Check the room setup (ensure tables and chairs are arranged as planned and that the planned arrangement will be effective).
- Check the room temperature and air circulation.
- Check the equipment:
 - All reserved equipment is present.
 - All equipment is functioning properly.
 - The presentation laptop is compatible with the video projector.
 - All presentations are loaded on the laptop and can be opened successfully.
 - The projection screen is positioned so that it can be viewed by all participants.
- Check that the electrical extension cords are taped to the floor.
- Check that the Internet connection is operating.
- Check that a participant package is placed at each seat (or is available at the registration table).
- Check that signs directing participants to the meeting room are in place.
- Check that the first snack and beverages are set up as expected.
- Check that the guards, receptionists, and other gatekeepers know about the event and are ready for the participants to arrive.
- Locate the restrooms, telephones, soda machines, and snack bars.
- Arrange the resource table for easiest access to the materials.
- Arrange the exhibitor area as arranged with the facility. Allow enough space around each exhibitor for participants to talk with exhibitors and view exhibits.

Set the Stage with the Opening Session

The opening session is critical to the success of the event. It **MUST** accomplish the following:

- Introduce the participants to one another. One important outcome will be the networking that occurs among participants. If the group has more than 25 people, limit introductions to name, affiliation, and profession. Just before the event begins, identify an individual to start the introductions and brief this person on the length of introduction he or she is to provide. Others will follow this model, so be sure it is what you want.
- Establish the goals and objectives for the event and make sure participants understand and buy in to them. Walk through the agenda, participant materials, and resources to demonstrate how the event has been designed to accomplish the goals.
- Demonstrate the owner's interest in the outcome. If the owner is enthusiastic and committed to the goals, the participants are more motivated.
- Remind all participants to turn off their cell phones.

Describe Project and Charrette Expectations

Clearly state the project description, issues, and goals, and the expectations for the charrette. At a minimum, the event sponsor or project owner should address:

- Goals – The results he or she desires from the project and from the charrette.
- Project description – A brief overview of the project with photographs and drawings as appropriate.
- Project status – What decisions have been made already and what work has been performed?
- Issues or concerns – Are there any barriers or problems that affect the project?

Review the owner's presentation before the event to ensure it will give enough information for participants to work from, but not so much that they become overwhelmed.

Create Effective Breakout Groups

Ensuring diversity among the breakout group members is important to the success of the event. Table 5 describes three methods commonly employed when creating breakout groups.

After creating the groups, check to make sure there is a good distribution of architects, engineers, and other experts. Make changes as needed. If the self-selection method is used to create breakout groups, ensure diversity and make adjustments so all groups have approximately the same number of members. When using any of the above methods, adjustments may be necessary if individuals are not satisfied with their assignments or if a group has fewer than three members.

Table 5
Methods for Making Breakout Group Assignments

| Method | How to | Description |
|--|---|--|
| Counting-off method | Ask the participants to count off (1, 2, 3, and so on, up to the number of planned breakout groups) | <ul style="list-style-type: none">• Apply when each breakout group will have the same task.• Effective way to separate friends and colleagues from the same firm, who are probably sitting together.• Ensures a variety of interests and expertise in each breakout group. |
| Self-selection method | Ask the participants to self divide into breakout groups depending on the topic of each breakout group and the individuals' area of expertise | <ul style="list-style-type: none">• Apply when each breakout group will address different topics.• Allows participants to select the topic of greatest interest to them. |
| Predetermination of assignments method | Predetermine the members of each breakout group | <ul style="list-style-type: none">• Apply when the expertise and interest of the participants is known.• Ensures knowledge and personalities are balanced within each group. |

Implement Successful Charrette Practices

These practices will lead to a successful event:

- Maintain consistency in breakout group assignments. Breakout group members bond during the initial breakout group exercises. The members of each group soon learn how to work together effectively and develop a rhythm that will carry through the entire event.
- Ask the groups to keep a record of items requested, questions the group cannot answer or issues it cannot resolve, and barriers the group sees to accomplishing a specific goal. These records will be given to the owner at the end of the charrette.
- At lunchtime, ask the participants to eat first and then take a tour of all the breakout groups' work. For the tour, participants walk from table to table (or room to room) to view and hear a brief (3 to 10 minutes maximum) explanation of each breakout group's approaches and results thus far. One person from each breakout group remains with the group's work and explains it to the other participants. It is best if each breakout group does the tour together. The overall facilitator is the timekeeper and tells participants when to move to another group.
- Invite the owner and local dignitaries who might not have attended the entire charrette to return and hear the group reports at the end of the day during the final report-out session. Often, these guests can respond to some of the ideas on the spot and commit to specific actions.
- Ask each group to prepare a specific maximum amount of material summarizing their conclusions to use for the report-out session. For example, limit the report to four flip chart pages, one template page, etc. This limitation helps to restrict the amount of time each group spends to report conclusions, and it encourages the breakout group members to focus on the most important aspects of their work. Reassure the groups that, in addition to this summary, ALL their work will be saved and given to the owners.
- Take photos of the speakers, breakout group discussions, materials produced by the breakout groups, and final presentations to ensure a complete record. Take high-resolution digital photos that can be used in a published report.
- Bring attention to the evaluation form in the participant packages during the opening session. Periodically remind the participants to fill out the evaluation forms and deposit

them in the collection box labeled “evaluation forms” near the exit of the meeting room. Stress the importance of feedback.

- Gather ALL papers from the groups at the end of the event and label them carefully (Group 1, Group 2 and so on). Large carrying cases (tubes or flat portfolios) are helpful for collecting, transporting, and retaining the material.
- Review and photograph or scan all written work completed by the breakout groups (e.g., summaries and brainstorming notes written on the flip chart pages and drawings) for future use in reports, funding proposals, and press releases.
- Consider providing breakout groups with various materials to support the charrette goals. This might include sticky notes (perhaps color coded for various subjects), facilitator notes (including lists of “ice breakers” and open-ended questions to ask the group), and wall charts that graphically guide conversations through subject constraints and opportunities, goal setting, and group guidance.

Facilitators can either record the group’s discussion on flip chart pages or ask for a volunteer scribe. It is often helpful to record audio conversations either on cassette tape or digitally. In either case, it is important to note main topic points discussed and capture the intent of the comments as closely as possible. In many cases, the scribe writes the exact words that were said. This record will be used later to summarize the event during the report-out session and to write the follow-up report.

Set Performance Goals

Often the most important outcome of the charrette is to arrive at a consensus on performance goals for the project. Setting performance goals during the charrette is important so all key players have a chance to participate, understand, and buy in to the goals. Studies show that clear goals made with all the key players have a much better chance of succeeding.

Chapter 5

Follow-Up and Next Steps

The follow-up is an important element of the event. In this part of the process, confirmation is established on the project's goals and momentum is generated for moving the project to completion. In this chapter, we describe how to follow up a charrette, materials that must be produced, and how to produce them.

Hold a Debriefing Meeting

Conduct a debriefing meeting with the steering committee to wrap up the process of planning and conducting the charrette and to discuss the outcomes. It is best to hold this meeting on the evening or morning after the event. Use this time to review the success of the event activities, clarify the decisions and project directions agreed on by the participants, and consider the next steps. Action items resulting from the debriefing meeting should include assigning responsibilities and completion dates for the remaining items discussed in this chapter.



Prepare a Report about the Results

Always produce a written report that summarizes the results of the event. Its purpose is to document and collate the information presented and discussed. In many cases, these reports help promote acceptance of the decisions made.

In advance, identify individuals who will take thorough notes and photographs and be responsible for preparing a final report of the meeting. Breakout group facilitators should plan to take notes or assign a breakout group member to be a scribe. At the end of the event, these notes should be given to the person who will prepare the final report, or the facilitators should be asked to summarize their groups' work and forward it to the final report writer.

It is best to develop an executive summary of the most important outcomes to accompany the more detailed report. The executive summary can be used to brief the owners, key stakeholders, event sponsors, potential providers of project funds, and other interested parties. A draft of the

Within a month after the event . . .

- Hold a debriefing meeting.
- Prepare a report about the results.
- Follow up with the participants.
- Encourage the participants to stay involved.
- Analyze and summarize the evaluations.
- Evaluate the value of follow-up events.

executive summary can usually be produced within a week after the event and can help to maintain momentum and align perceptions about the event.

Make the final report available to those who want more detail about the event and its results. Incorporate photographs from the event and scanned drawings created during the breakout group discussions to illustrate the decisions made. Circulating a draft report allows the final report to include participant comments, additions, and corrections.

A support letter or letter of commitment from the owner or key stakeholder is a valuable addition to the final report.

Follow Up With the Participants

The process does not end when the event is over—in fact, it has just begun. Good follow-up shortly after the event will help keep the energy and momentum going.

Try to produce the executive summary within one to two weeks after the event. Send it to all participants with a note of thanks and appreciation for their time, expertise, and energy in making the charrette a success.

Encourage the Participants to Stay Involved

Determine specific next steps and assign champions for each. Set a specific time to reconvene with a report on direct results from this charrette to share with the participants, a smaller committee, or a larger group.

Analyze and Summarize the Evaluations

Review the evaluations immediately after the event concludes. Include a summary and an analysis of this feedback in the final report. This information can also be very helpful when planning events for future high-performance projects.

Summary

Critical to the success of a high performance project is proper planning. A charrette is a formalized meeting process to help ensure the right team is in place and understands the project so that exceptional results will be achieved.

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