



Running A Charrette is like...

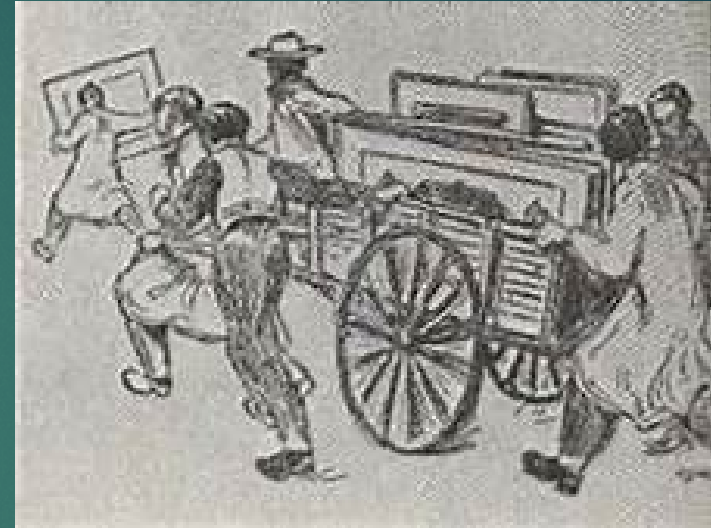
LESSONS LEARNED FROM USACE PLANNING CHARRETTES

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So, what the heck IS a charrette, anyway?

- ▶ One R or two?
- ▶ History: Military, A&E, others?
- ▶ Planning vs. Design Charrettes
- ▶ Charrette Roles and Responsibilities ("Facil" = Easy)
- ▶ 3x3x3, USACE Planning Modernization, etc.





What is the Problem?

What is the Solution?

What is the Process?

What is the Risk?

(...and if your team isn't asking these questions,
you should be.)



Prep, Deliver, Reflect



- ▶ Prep: phone calls, emails, read-aheads, vertical team involvement, provide opportunity for learning the process ahead of the charrette
- ▶ Deliver: arrive a day early to see the room, meet the team, clarify roles and Day 1 kickoff
- ▶ Reflect: facilitate closure at the end (or maybe beyond the date of the charrette), be available for follow-on guidance

LESSONS LEARNED from past charrettes:

People

- Invite decision makers (and/or decision “breakers”?)
- Social time w/team and charrette members – allow for breaks and inquire 1-on-1 on viewpoints (HINT: Facilitators are always “on”!)
- Get a commitment from team to be present & vocal at charrette
- Sponsors want to see progress – celebrate success and document decisions
- Form, Storm, Norm, Perform (and Adjourn!)

Process

- Two months’ notice is optimal. Schedule prep calls and emails, coordinate at all three levels + sponsor/partners
- Develop a sense of needs, goals, expectations
- Work toward buy-in from all attendees (or most) on the Planning Process, 3x3x3, the need for a charrette
- Bad news doesn’t age well – if there is a roadblock, STOP and inquire whether this is a game changer

Place

- On site – know the physical room size, etc. & BE PREPARED for Virtual participation
- Site visit is NOT necessary for Facilitators but may be for the audience – gage this early and fit into your schedule
- Be grateful for the space you are given, know the limitations and implications



A personal story...





Ingredients for a successful charrette

LESSONS LEARNED FROM USACE PLANNING CHARRETTES

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SMART Planning Tools



- ▶ Charrette
- ▶ Decision Management Plan
- ▶ Risk Register
- ▶ Decision Logs
- ▶ Report Synopsis



Decision Management Plan



- ▶ Outlines the strategy for making the next decision.
 - ▶ What is the decision
 - ▶ What information is needed to make the decision
 - ▶ Who are the decision makers
 - ▶ What is the schedule



Risk Register



- ▶ A tool to assist the team in acknowledging risk and uncertainty
- ▶ Collects information in a spreadsheet
 - ▶ Risks and associated causes
 - ▶ Consequence of the risk
 - ▶ Likelihood of the risk occurring
- ▶ Includes feedback from Division, Headquarters, and the sponsor



Decision Log



- ▶ A tool for the study team to document decision made
- ▶ Decisions may change the path forward, schedule, need for analysis
- ▶ A log ensures decisions are documented
 - ▶ Who, What, Where, When and Why



Report Synopsis



- ▶ Brief document that describes the study path to date:
 - ▶ Scope
 - ▶ Cost
 - ▶ Schedule
 - ▶ Risks
 - ▶ Division and Headquarters participation and/or concurrence

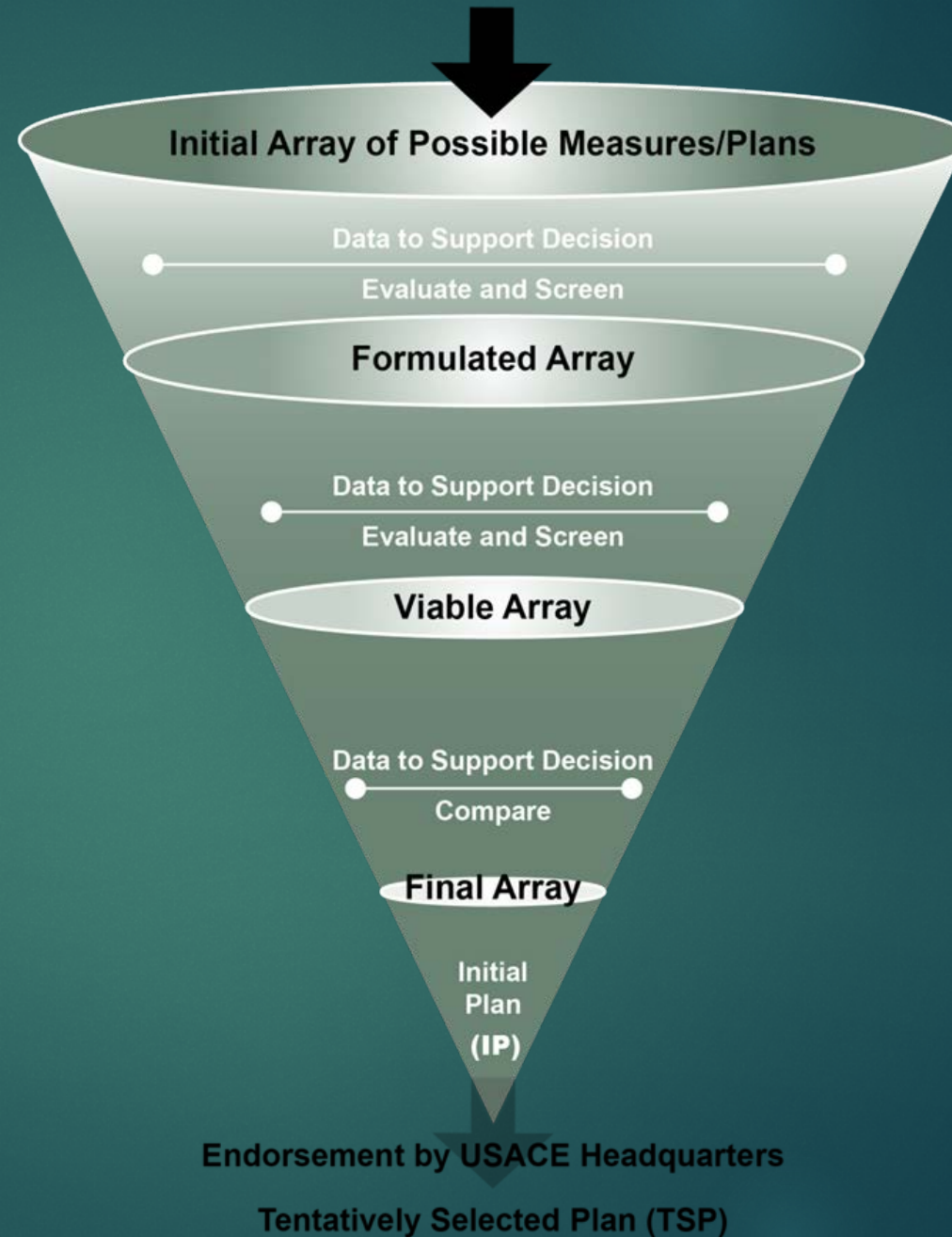


Six Step Planning Process



- ▶ Step 1 - Identifying problems and opportunities
- ▶ Step 2 - Inventorying and forecasting conditions
- ▶ Step 3 - Formulating alternative plans
- ▶ Step 4 - Evaluating alternative plans
- ▶ Step 5 - Comparing alternative plans
- ▶ Step 6 - Selecting a plan

Planning Process





Charrette Agenda



- ▶ Tailored to meet the team's objectives
- ▶ First drafted by the PDT
 - ▶ Solicit input from the vertical team
- ▶ Facilitator/facilitation team will work with team to finalize agenda
 - ▶ Define roles and responsibilities
 - ▶ Seek to incorporate the non-federal sponsor
 - ▶ Incorporate small and large group hands on exercises
- ▶ Prepare for virtual participation

Agenda Example

Day 1 Morning

Introduction

- Roles and Responsibilities
- Goals and Expectations

SMART Planning Overview

- Introduction to SMART tools

Break

Study Overview and Virtual Tour (USACE)

Study Information and Expectations (Non-federal sponsor)

Lunch

Day 1 Afternoon

Plan Formulation Part 1

- Problems
 - Opportunities
 - Objectives
 - Constraints
- ### Exercise

Break

Discuss Next Planning Decision

Input/Advice from the Vertical Team

Summary and Day 2 Expectations

Day 2

Plan Formulation Part 2

- Future without Project Condition
- ### Exercise

- Measures, Alternatives, Screening Criteria
- ### Exercise

Break

- Risk Register
- ### Exercise

-Lunch

- Decision Log
- ### Exercise

- Decision Management Plan
- ### Exercise

- Revisit and summarize task list

Lynn's Lessons Learned

