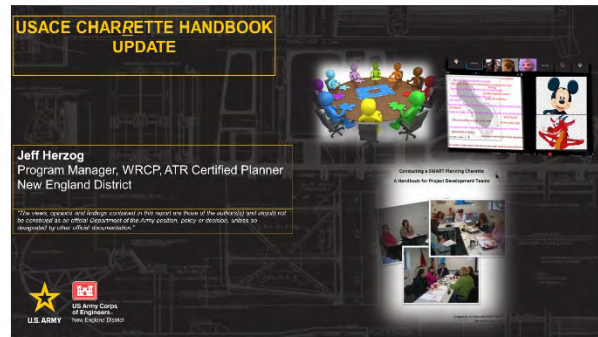


This webinar provided an overview of the updated Charrette Handbook, which focuses on how teams can facilitate a collaborative session to gain vertical and horizontal participation and alignment. Presenter Jeff Herzog (New England District planner and program manager) discussed the history of planning charrettes and the Civil Works planning process, outlined how to plan, carry out, and manage one, and shared best practices and recommendations from the handbook.



This summary of the Question/Answer session of the webinar is not a transcription; questions and responses have been edited and reordered for clarity.

For additional information and resources:

- [USACE Charrette Handbook – Conducting a Risk Informed Planning Charrette: USACE Handbook for Coordinating, Planning, and Executing Charrettes to Improve Effectiveness and Efficiencies Within the Project Lifecycle](#)
- [Collaboration and Public Participation \(CPP\) Community of Practice Knowledge Management Portal site](#)
 - [CPCX Facilitation Resources](#)
 - [Collaboration and Public Participation Center of Expertise \(CPCX\) Public Website](#)
- [District Public Involvement Specialists](#)
- [USACE Public Involvement & Conflict Resolution Training Offerings](#)

Planning a Charrette

How can study teams find an appropriate facilitator for their charrette when looking outside their district?

First, the planning team should determine where in the study process they are and then reach out to the relevant [business line Planning Center of Expertise \(PCX\)](#) to discuss considerations for scoping and planning the charrette, including developing objectives and any suggestions the PCX may have for a facilitator. In addition, teams can work within their district and MSC to find similar studies and whether or not they had a charrette, and if so, who the facilitator was. The CPCX is another resource for teams to reach out to if they need assistance in locating a facilitator or developing the charrette.

There are many avenues and options for getting charrette resources, however, if all else fails, they can reach out to Maria Lantz (CPCX), Hunter Merritt (CPCX), Chrissa Waite, Diane Perkins, Jeff Herzog, or others in the CPCX, all of whom are available to help the team find a facilitator. When coordinating with the CPCX, study teams should reach out early so there is ample time for them to find a facilitator who is available and will be a good fit. Teams can connect with the CPCX via their district's [Public Involvement Specialist](#).

What factors should study teams consider when determining the scale and length of a charrette?

The scale and focus of a charrette will be based on the needs of the team and where they are in the planning process. If a study team already has established and aligned the study's problems,

opportunities, objectives, and constraints, documented the screening criteria to be used measures and alternatives, and has already determined an initial focused array of alternatives, a 3-4 hour virtual charrette to discuss anticipated issues or challenges may be sufficient to discuss formulation. A team closer to the beginning of the study process may want to consider conducting a 1-3 day in-person charrette. If there are budget constraints, plan for a shorter in-person charrette supplemented with virtual meetings held beforehand to lay the groundwork.

In general, charrettes are versatile and flexible to the needs and constraints of the team. However, while there is no minimum length, as scaling increases, teams should look more closely at the results they're trying to accomplish to determine if they need to hold a more costly in-person charrette (e.g., is an in-person site visit required to inform the discussion).

What USACE-allowed scheduling tools are available for coordinating the availability of charrette participants?

[Doodle](#) has a free option that allows users to poll participants on up to 20 date/time options and [When2Meet](#) is a free simple scheduling website that many have used as well.

Conducting a Charrette

What tools can study teams use to learn more about conflict de-escalation in preparation for a charrette?

Conflict de-escalation starts with preparing ahead of the charette: knowing who is coming, foreseeing any issues, and understanding the personalities and histories of those who will be in the room. A good way to do this is to check in with some of the participants, including the sponsor, and address any potential conflicts in advance by arranging the room and setting up breakouts accordingly. In the room, a facilitator can work on conflict de-escalation as the need arises by asking questions to identify underlying issues and interests, establishing and enforcing ground rules, and working through problems with the person or people involved during a break.

The CPCX has a "[Facilitation 101](#)" presentation available to all teams that includes tips for identifying when a facilitator is needed and tips for meeting and team facilitation.