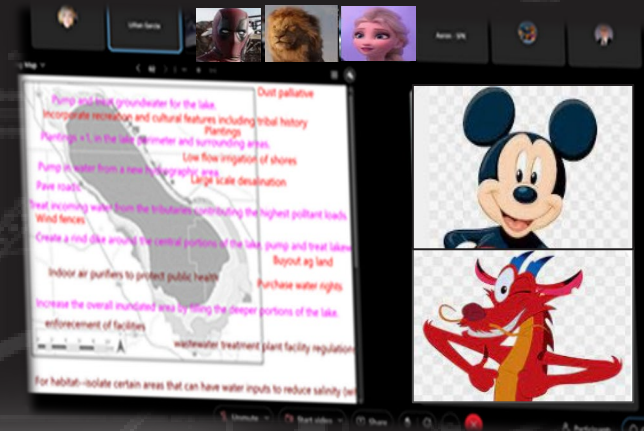


# CHARRETTES IN THE RAPID FRAMEWORK



Conducting a SMART Planning Charette  
A Handbook for Project Development Teams

Jeff Herzog  
Dan Linkowski

*"The views, opinions and findings contained in this report are those of the authors(s) and should not be construed as an official Department of the Army position, policy or decision, unless so designated by other official documentation."*



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# WHO ARE YOU



Plan Formulation

Cost

Other (please specify below)

Economics

Real Estate

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Cultural Resources

Engineering

---

Environmental

PM

---

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Please comment in the chat!



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# KNOWLEDGE CHECK

I KNOW THIS MUCH ABOUT CHARRETTES....



What is a Charrette?

Please comment in the chat!

I've participated in charrettes, my District uses them occasionally

Please comment in the chat!

Probably More than you, Jeff 😊...

Please comment in the chat!



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# KNOWLEDGE CHECK

I KNOW THIS MUCH ABOUT THE CHARRETTE HANDBOOK...



I use the Charrette Handbook often when planning charrettes...

Please comment in the chat!

I've been looking for the Charrette Handbook, but successfully winging it in the meantime...

Please comment in the chat!

I just tell my facilitator to figure it out and let me know..."Ignorance is bliss"

Please comment in the chat!



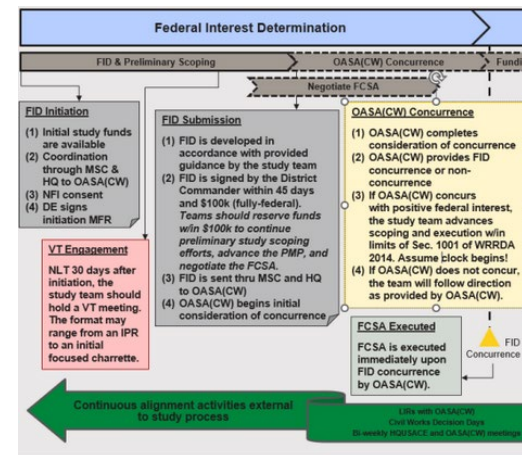
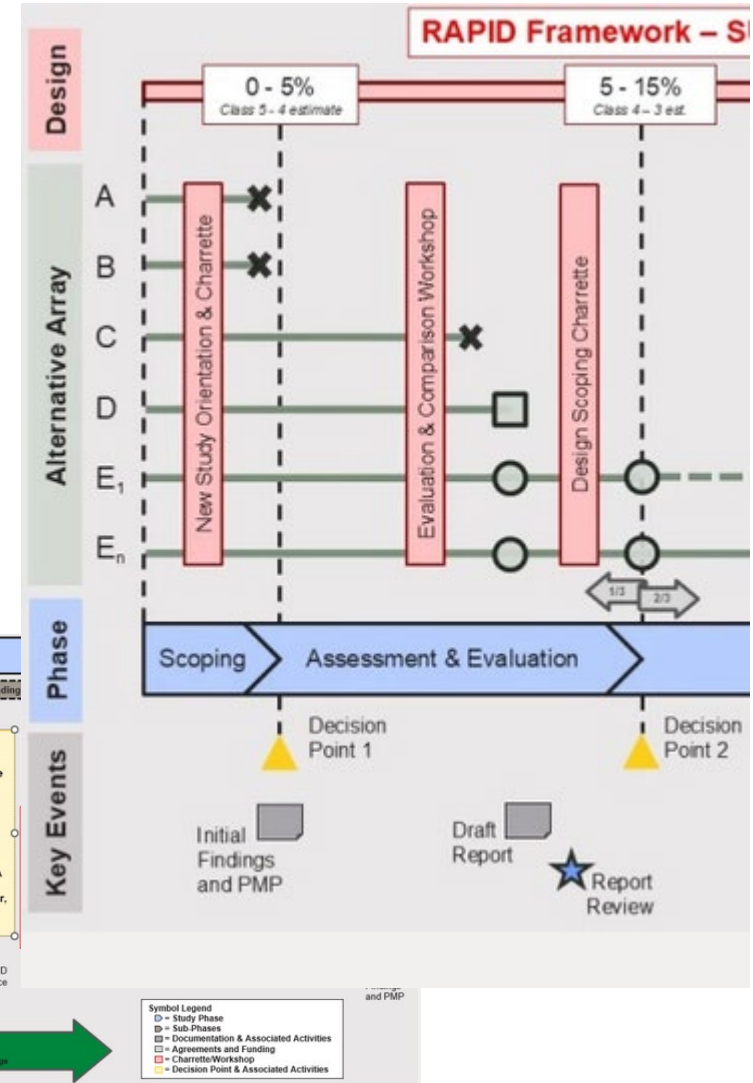
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# RAPID VISION - COLLABORATION



## RAPID Charrettes/Workshops

1. Scoping Charrette
  - a. "NLT 30 Day Meeting" and/or Initial Scoping Charrette
  - b. New Study Orientation & Charrette
2. Evaluation and Comparison Workshop
3. Design Scoping Charrette





# RAPID VISION - COLLABORATION



## ***MAKE THESE EVENTS WORK FOR YOU!***

Strategic Element	Description & Expectations
<b>The Core Intent</b>	Shift from linear, end-of-phase reviews to concurrent, aligned development. Charrettes bring the Vertical Team (VT) and Subject Matter Experts (SMEs) to the table <i>during</i> formulation to empower the Project Delivery Team (PDT), solve problems in real-time, and minimize rework.
<b>The Mandatory Rules</b>	<ol style="list-style-type: none"> <li>1. <b>Execution is Required:</b> Charrettes and workshops are not optional under RAPID.</li> <li>2. <b>Vertical Representation:</b> Every required event must invite at least one active representative from the MSC, HQ, and OASA(CW). The meeting time will be driven by when the PDT needs to meet, not when the VT is available. The need, primary goals, and how should be provided by the district and coordinated with the MSC.</li> <li>3. <b>Documented Outcomes:</b> Decisions, accepted risks, and screening criteria must be formally captured in the appropriate study products (risk register, MFRs, report, PMP).</li> </ol>
<b>District Flexibility (The Bounds)</b>	Districts own the <i>how</i> . You have the flexibility to scale the duration, format (virtual, hybrid, in-person), and specific agenda to fit the study's complexity and budget. The primary bound is that the event must actively drive progress toward a <u>D</u> ecisive milestone while maintaining VT <u>A</u> lignment. As long as these events occur ahead of key decision points as outlined in the KMP, the timing and duration of each is also flexible. These events can be spread out over a couple months or focused to part of a single day.



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# BRIEFING LAYOUT



- The History of the World According to Me...
  - Legacy Planning to SMART Planning to Risk Informed Planning to the RAPID Framework
  - Myth Busting
  - Common Questions
  
- How charrettes could work in a RAPID Framework
  
- Best Practices and Recommendations
  
- Discussion and Questions



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# CHARRETTE MYTH BUSTING



- ❖ They are too expensive and take too long....
- ❖ Not enough planning time to make it work....
- ❖ We don't need to do a charrette; we will just hold a workshop....
- ❖ They must be in-person and continuous for a weeklong...
- ❖ I must invite the public....
- ❖ It's a Planning thing....
- ❖ It's consensus building and violates Federal Advisory Committee Act (FACA)...



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- ❖ When do I hold a charrette...
- ❖ Is it for my FID?
- ❖ Is it a Scoping Charrette?
- ❖ Is it an Evaluation and Comparison Charrette?
- ❖ Is it a Technical/Value Charrette?
- ❖ Is it a Design Scoping Charrette?



- ❖ Who drives the charrette and the charrette agenda- PM or Planner.  
Yes... it should always be a team effort.



Engineering, PPMD, Planning...  
They are all "the PDT"

*NOTE: When planning the charrette agenda, objectives, and outcomes- FID, PMP, Study Outline/Fact Sheet/Justification Sheet are great starting points.*





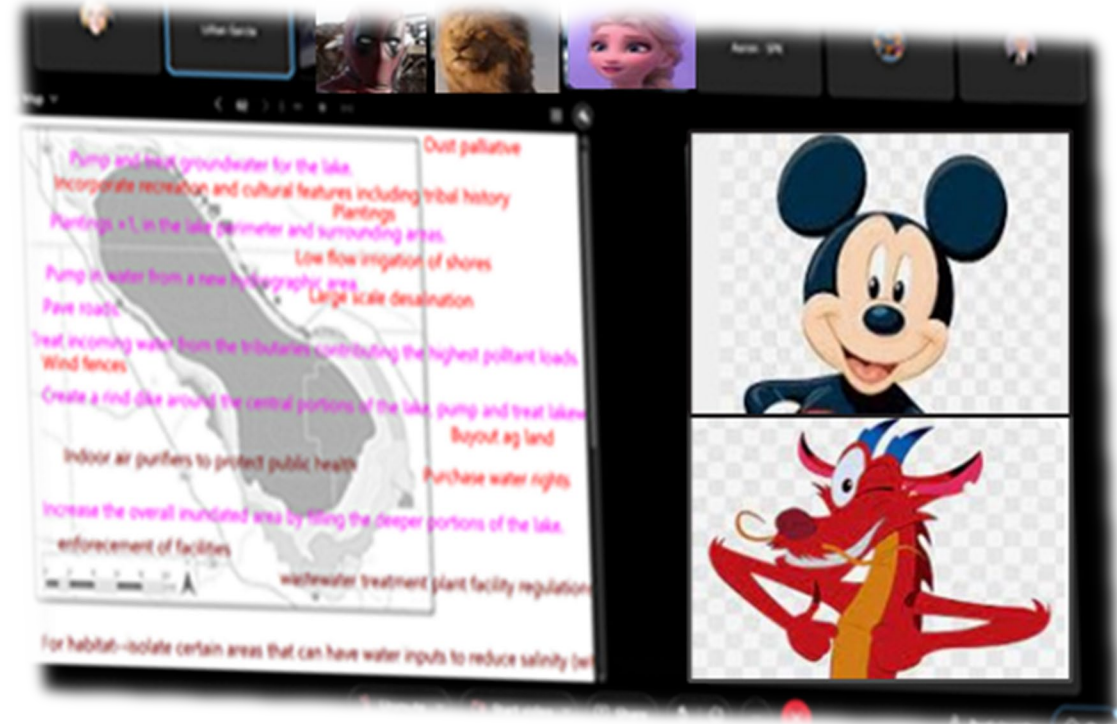
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# CHARRETTES TODAY

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- ❖ Some districts use charrettes, some don't. Why not???
- ❖ Charrettes use study money and it's not cheap-
  - ❖ In-Person: \$100-\$200K (location dependent)
  - ❖ Virtual: \$25K-\$50K
  - ❖ Hybrid: \$25K-\$200K
- ❖ Charrettes are NOT just a planner's tool; they are a vital PDT tool for scoping and vertical alignment throughout a study
- ❖ Charrettes, they don't have to be continuous. Some teams break charrettes up over multiple phases and iterations
- ❖ Charrettes, its not just for New Starts! Many charrettes are focused on technical or planning workshops post-DP1 Milestone
  - ❖ Evaluation and Comparison Workshop (Charrette)
  - ❖ Design Scoping Charrette



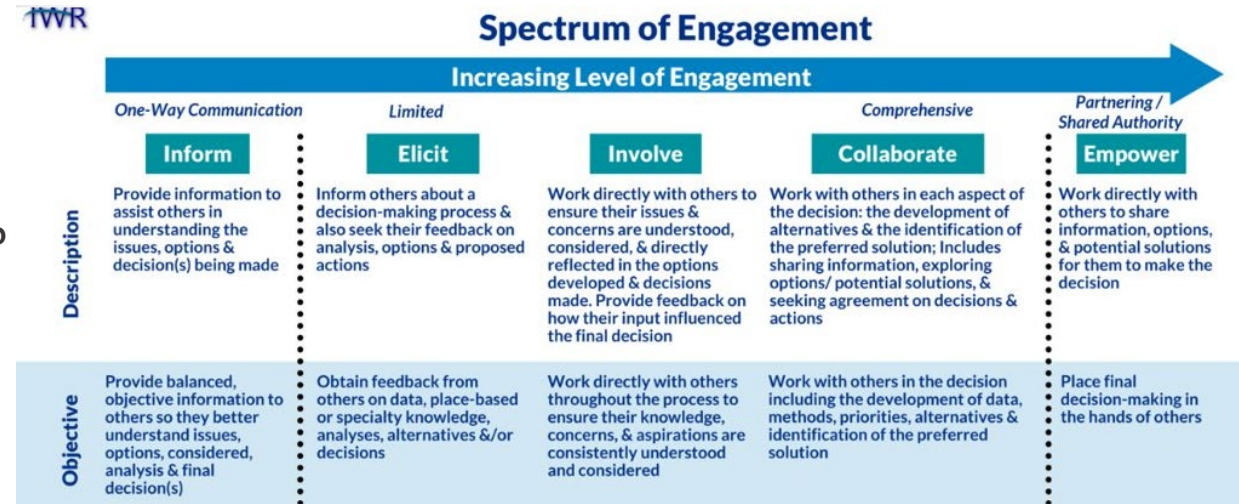


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# WHAT SHOULD MY CHARRETTE LOOK LIKE???



- ❖ What information do we have?
- ❖ What information do we hope to glean from the charrette?
- ❖ How much time do we have for the charrette?
- ❖ What is the best format to get that information?
- ❖ What information is needed to develop the resources for that format?
- ❖ Who is providing that information? How much time do they need to put that information together?
- ❖ Who is facilitating that discussion?
- ❖ What are the primary objectives of the charrette? Scoping, VTAM, Plan Formulation (AMM Level).... All?



USACE IWR Spectrum of Engagement

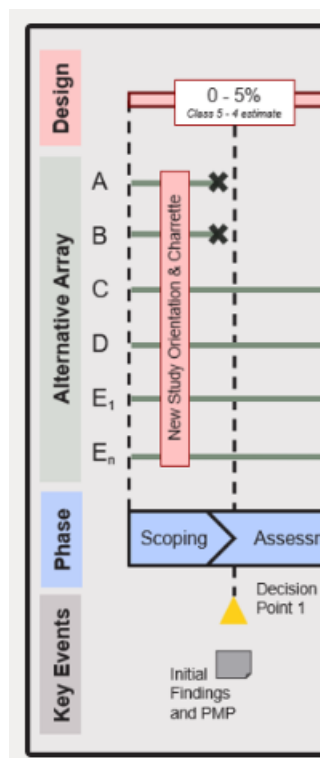


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# THIS COULD HELP ME GET TO DP1? DP1 COULD BE A PART OF MY CHARRETTE?



- ❖ Who participated (was invited) to your charrette?
- ❖ Planners- Did you identify...
  - ❖ Study Area
  - ❖ POOCs
  - ❖ Initial iteration of the Planning Process Steps?
  - ❖ Resources needed to support- People and Tools
- ❖ PMs- Did you identify...
  - ❖ Scope, Schedule, Budget
  - ❖ Communication Management
  - ❖ Change Management and Study Governance
  - ❖ Risk Management
  - ❖ Review Management
- ❖ ETL- Did you identify
  - ❖ Existing information and tools required to identify a Plan
  - ❖ Resources necessary to execute the necessary work
- ❖ All- At the end of the charrette, the team determines, is there a federal interest in moving forward? Is that federal interest scalable within the time and funding constraints?
- ❖ MSC- Is the MSC Commander available at the end of the charrette for an out-brief/ DP-1 Milestone meeting? (See KMP for requirements at DP-1)



### First Decision Point:

The first decision point during a feasibility study will document the vertically aligned agreement on the path forward for the project, acknowledging and accepting the identified study and implementation risk and uncertainties and the strategies to manage those risks.

The decision does not require a meeting, unless requested by the decision maker. The decision maker the MSC Commander may request a pre-decision briefing and identify the materials or information needed to support the decision.

### Decision Maker:

The MSC Commander is the decision maker for the first Decision Point. The decision may be elevated to the Deputy Commanding General for Civil and Emergency Operations (DCG-CEO) but may not be further delegated.

### Decision-Making Mindset:

Decisive, clear, and driven by uncertainty.

First Decision Point Requirements from RAPID KMP



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# I NEED *HOW MUCH TIME* TO PLAN A CHARRETTE!?

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- ❖ Recommend: Six weeks is great... but if you have less time, don't skip the charrette, scale the charrette
- ❖ Appendix A: Charrette Handbook lays out a six-week planning checklist for your charrette
- ❖ Remember, it's not all about you! Consider your Sponsor, key stakeholders and Resource Agencies.
  - ❖ Some districts are not including resource agencies in charrettes, others invite everyone, and it almost becomes a public meeting
- ❖ Charrette logistics take time, especially if you are looking to rent a facility! Include your OC, Logistics, and Admin team in the discussions early.
- ❖ Consider the timing of your charrette around seasonal distractions; it could delay the charrette, limit attendees, or impact the cost of logistics





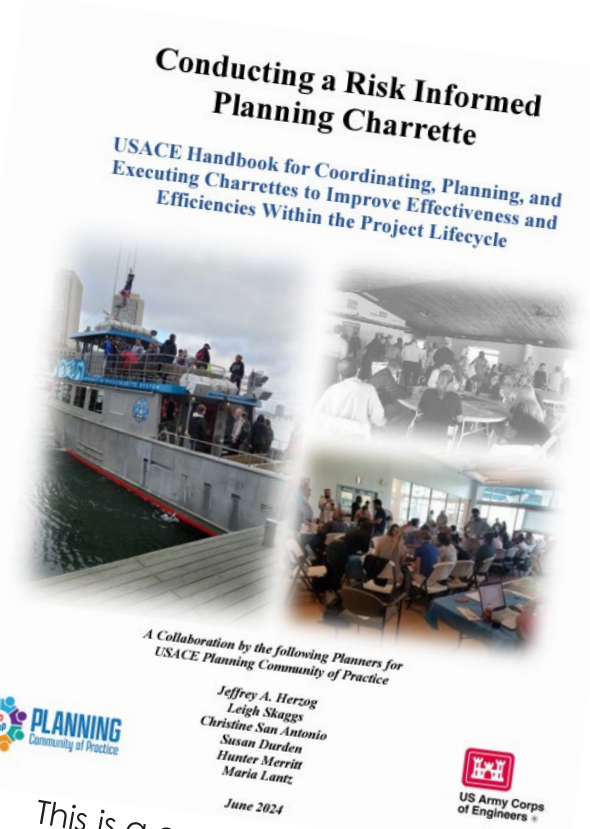
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# BEFORE the charrette:

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- ❖ **PREPARE:** Do your homework. As much as possible, develop POOCs\*, FWOP\*\*, evaluation criteria, possible management measures and formulation strategies, and key uncertainties in advance of the charrette. Give participants something to react to, rather than starting from a blank page.
- ❖ **PARTICIPANT AGENDA:** For this agenda, use a “block agenda” concept (i.e., major topics over a larger block of time), instead of detailed time slots for each specific topic.
- ❖ **FACILITATOR AGENDA:** Develop a detailed facilitator agenda that breaks down details of topics, resources, presenters, etc.
- ❖ **SITE VISIT:** Planning a site visit on the first day is super helpful to get everyone oriented to the study area.
- ❖ **INVITATIONS:** Start coordinating the invitation list with key team members and sponsors ASAP.



This is a great reference for planning charrettes!

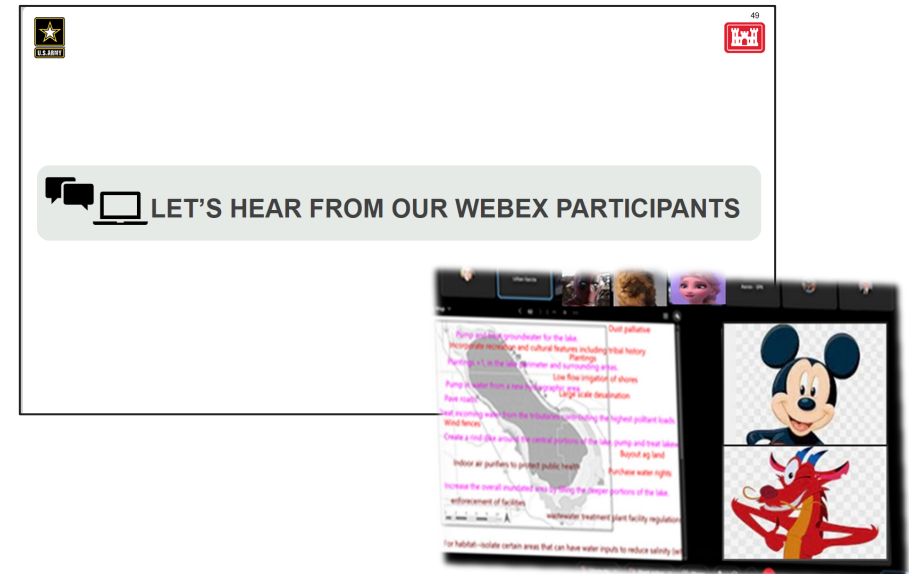
\*POOCs- Problems, Opportunities, Objectives, Constraints

\*\* FWOP- Future Without Project

# RUNNING the charrette:



1. **FACILITATOR:** Having a facilitator with knowledge of the planning process is great but is not a must have. You want a good communicator with good energy.
2. **NOTE TAKER:** Have a note taker to capture most of the discussion.
3. **ONLINE MANAGER:** If you have virtual participation, it's necessary to have someone monitoring the online chat, manage on-line activities, etc.
4. **TECH SUPPORT:** In terms of IT support, it's super helpful to have someone with technology savvy help set up the room, including audio for on-line participants.







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# WHO YOU GONNA CALL?

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**Download a copy of the Charrette Handbook:**

<https://planning.erdc.dren.mil/toolbox/library.cfm?Option=Listing&Type=Report&Search=Policy&Sort=YearDesc>

**Do you have a Planning Mentor for your Study?** Have your Planning Chief reach out to PCoP

**Do you need a facilitator?** Reach out to the Collaboration and Public Participation Center of Expertise (CPCX) - [CPCX Collaboration Public Participation \(army.mil\)](http://CPCX.Collaboration.Public.Participation.army.mil)

**Are you looking for a Water Resource Certified Planner?** Look into your Planner Database- [IWR Planning Assistance Library \(planusace.us\)](http://IWR.Planning.Assistance.Library.planusace.us)

**Who is on your PL&C Review Team?** Ask your MSC, and then coordinate with that Review Team early and often, who is your Review Manager?

**Still not sure who you need?** Contact the Business Line PCX for your study and ask questions. [Planning Community Toolbox: People \(dren.mil\)](http://Planning.Community.Toolbox.People.dren.mil)



**The Planning World according to Jeff's observations-** *"Every Study is unique and will face challenges. But you don't have to go it alone, someone out there can help you navigate the troubled waters. But don't wait until you're caught in the middle of the storm, check the weather before you depart."*



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# QUESTIONS AND DISCUSSION