



COMMUNITY
TOOL BOX

Charettes
Intensive brainstorming sessions where volunteer participants sketch and illustrate their ideas for planning and design solutions and present them to the community.

Charettes

WHAT WE'VE FOUND

Charettes generate tremendous energy. They bring together professionals who are experts in their fields creating strong partnerships among organizations and special interests. Most importantly this type of event can give community members the chance to see comprehensive plans and designs for an area.

Make no mistake, charettes take a lot of work to organize and orchestrate but we feel the effort is well worth the result. It can give a project a terrific jump-start to completion.



The term "charette" is French for cart. In the early 20th century, professors from the Ecole des Beaux Arts in Paris would send a cart to pick up students' work at the submission deadline. Some students, frantic to complete their drawings, would ride on the cart and continue working as it rolled down the street, hence, working "en charette."



Just the Facts

Charettes bring together experts in the field to develop ideas on how to improve a community's natural and/or cultural resource. The outputs of their efforts are maps and designs that offer solutions to such issues as preservation, access and use, interpretation, development, etc.

Charettes can involve a few or many people; they can last a couple hours or extend over several days. It all depends upon the area, the resource, the purpose and goals for the charette and people's interest. An example charette schedule is participants gathering on a Friday, touring the area, and hearing presentations from local experts and citizens. On Saturday, participants are divided into teams each assigned physical design, interpretation, or other relevant topics. Their assignment is to create plans, detail and section drawings, and perspective sketches. Later that night, or the next day, participants present their recommendations to each other and community members.

While only a few people might do the actual work, one of the biggest keys to producing a successful charette is to inform and engage as many people as possible in the community before, during and after the event. Charettes can be a key public involvement tool.

How to Do it

1. Select and Recruit a Core Charette Planning Team

This committee is ultimately responsible for the entire event and does most of the lead and follow-up work. The planning team should be small (5-7 members) and comprised of representatives from community organizations, agencies, and professional societies. If possible, include key project proponent(s).

The planning team will share the workload by organizing sub-committees and recruiting additional volunteers. Sub-committees and ad hoc volunteers can work on a variety of tasks such as: food committee; transportation and housing (for people coming in from out of town); promotion and fundraising (e.g., raffle, door prizes, etc.); set-up and clean up; newsletters and publicity; research and preparation of background materials for charette participants; and contact database list maintenance (names, addresses, etc.).

2. Develop a 'Vision and Desired Outcomes' Statement

This is the planning team's first job. Using a consensus process will help the team understand the products and outcomes the group wants to get from the charette. The statement will drive all decision making related to planning the charette.

3. Plan the Charette Structure and Schedule

Prepare an hourly schedule for how the actual charette will occur from beginning to end. This will require the planning team to clearly think about the structure of the event (i.e., number of teams and their individual or collective assignments) and to think through the details about the sequence of events and steps participants will go through.

4. Develop a Timeline and Task List

Choose a date for the charette (approximately 3-5 months ahead) and then prepare a timeline targeting dates to accomplish key tasks.

5. Establish a Budget

Prepare a budget showing various partner contributions, projected expenses, fundraising needs, etc.

6. Choose Location and Facility

Typically the best facilities include a large meeting space, smaller breakout rooms, and a kitchen or food service area. The space should be secure and should be available for extended hours (early in the morning until late at night).

7. Identify Charette Participants and Begin Recruiting

Prepare a list of the desired skills for the participants. Examples include: landscape architects; planners; transportation engineers; park and recreation managers; natural and cultural resource experts; local government officials; business and industry leaders; schoolteachers; students; and nonprofit organizations. Decide on the optimal number and begin to identify actual people to match each category. Then start inviting them to participate in the charette. Seek diversity in your selection process (i.e., women, men, youth, seniors, ethnic groups, etc.).

8. Implement a Publicity and Community Outreach Strategy

Prior to the event, consider preparing press releases, surveys, newsletters, displays, and mass mailings. When the charette actually occurs, plan for two public meetings: when the charette participants are first convened and when charette participants present their completed work. In order to increase attendance at the final meeting, consider giving out door prizes or holding a raffle. Also consider planning and organizing parallel and supporting activities to occur si-

multaneously with the charette, like bike rodeos, tree plantings, or clean-ups.

9. Prepare Orientation Packets for Charette Participants

A couple of weeks prior to the event, organize and mail an orientation packet to each charette participant. Included in the orientation packets should be the following: cover letter; background information on the project and goals; information on natural and cultural resources in the area, recreation opportunities, and issues participants should be aware of; historical photos; museum/archive references; aerial photographs; local and regional maps; summary and results of community survey; program information and brochures; agenda and schedule; complimentary raffle ticket and/or other trinket; participant list (with address, phone and email); and copies of advance publicity (newsletters, articles, etc.).

10. Gather Supplies

Prepare a list of needed supplies and make assignments for collection. Label loaned materials with owners name to assure they get returned. Solicit donations from local businesses for goods, services, and funds.

11. Plan the Closing Public Presentation

Provide detailed instructions, supplies and materials to the charette teams regarding how to prepare for the closing public presentation. Build in opportunities for public comment and feedback on the design ideas/presentations, acknowledge and thank sponsors and volunteers, celebrate afterwards with food (cake, coffee, etc.).

12. Take Lots of Pictures

Assign someone the responsibility of official photographer for the event including good close-up photos of the final display boards and panels.

13. Have Fun and Enjoy the Creative Energy!

Use It If...

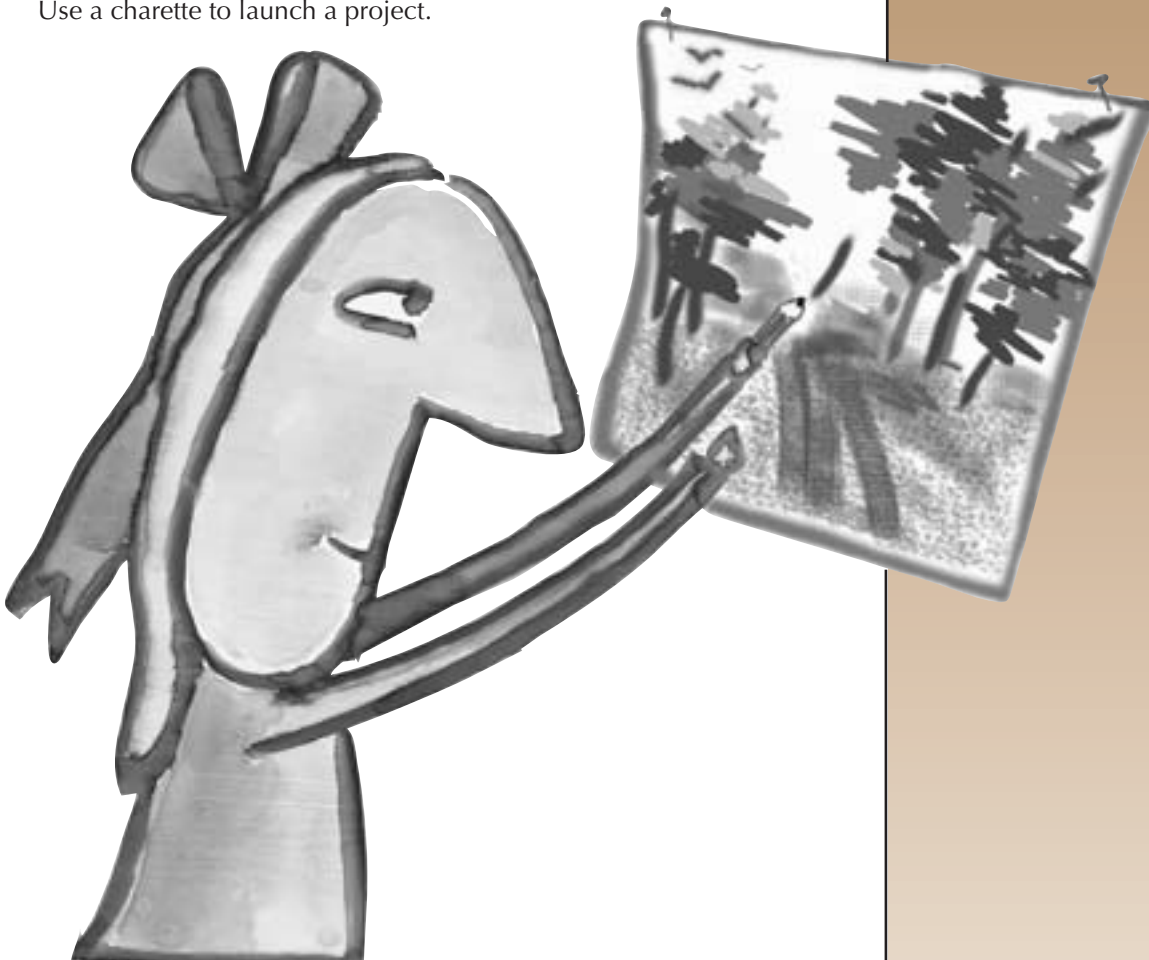
- You want to quickly generate illustrated design ideas in a cooperative, creative and open atmosphere.
- You want to energize a constituency. The creative design process helps people visualize possibilities and expand their thinking and commitment to a resource.
- You are trying to draw a lot of attention to a resource and its value in the community.

Forget It If...

- You don't have a committed pool of volunteers to organize the event or if you cannot recruit skilled professionals to participate.
- You have yet to define your project. You need a project statement that clearly explains the project and identifies stakeholders in order to give a charette structure.

Timing is Everything

Use a charette to launch a project.



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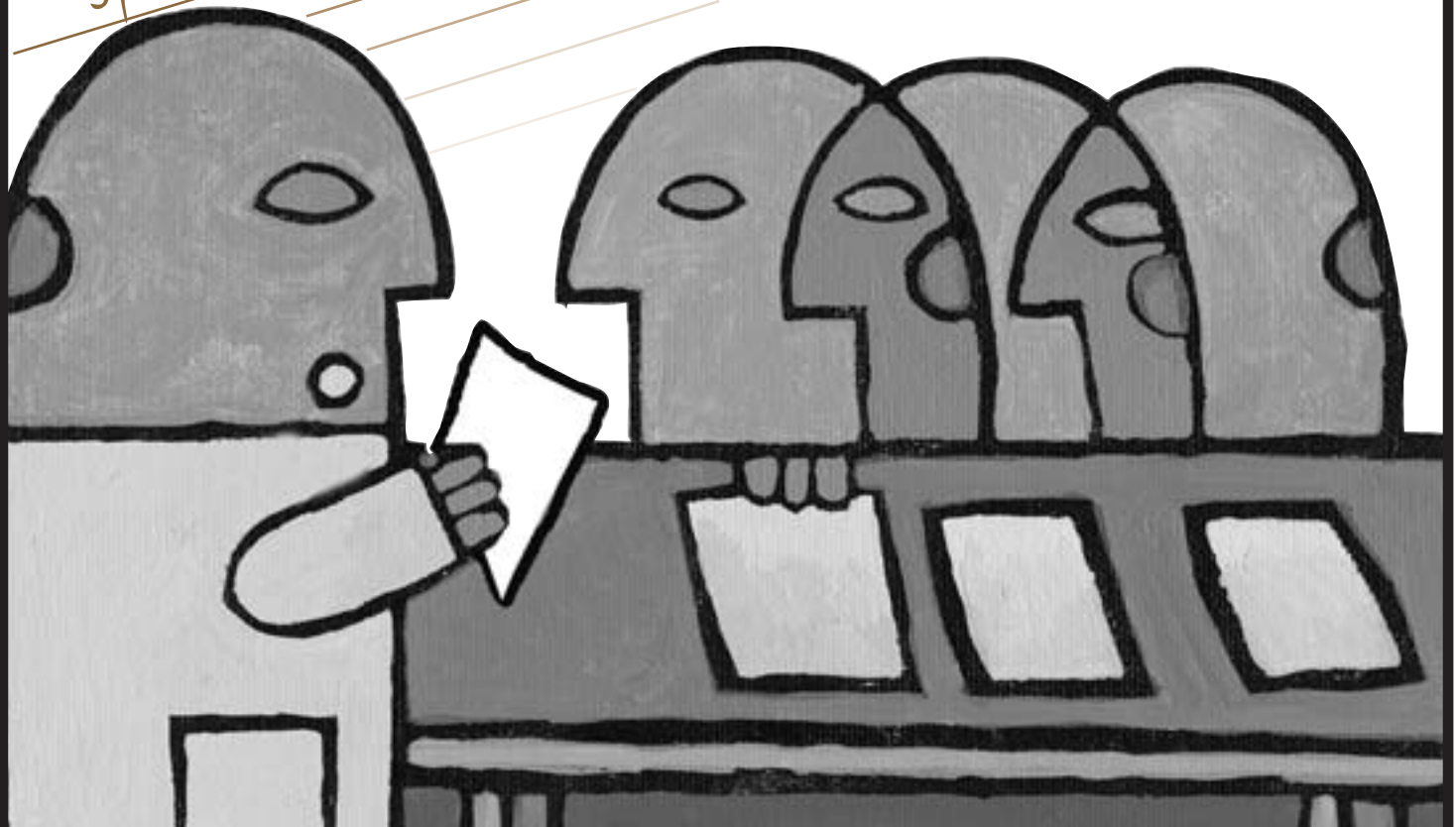
Meetings

What We've Found

Say the word "meetings" and most people groan. With good reason: too often the meetings we attend are unfocused, unproductive, and uninspiring. They do not have to be that way. Having a good agenda (and following it), keeping track of the time, and minimizing tangents and sidebar conversations can all help. For a project team or task force who meet regularly, the best way to keep them involved is not to waste their time. Make the meetings interesting: vary formats, invite guest speakers, accomplish real work, serve refreshments, and have some fun.

Meetings:

Where people come together to accomplish specific purposes.



JUST THE FACTS

A meeting occurs at a set time and place, there is a defined group of participants, and an agenda, which addresses the goals and purpose. Meetings can last all day, over a meal, or for a shorter amount of time. Ninety minutes is considered the maximum amount of time for a meeting to last without including breaks in the agenda.

If the purpose of a meeting is to get work done, participants need to know how final decisions will be made: by consensus, group vote, or a single person. If the purpose of the meeting is to share information, participants should be sent supporting materials prior to the meeting for review.

Meetings should take place in comfortable, accessible rooms or facilities, depending upon the size of the group. While schedules are difficult to coordinate, meeting dates that are chosen well in advance and at convenient times for participants will be better attended.

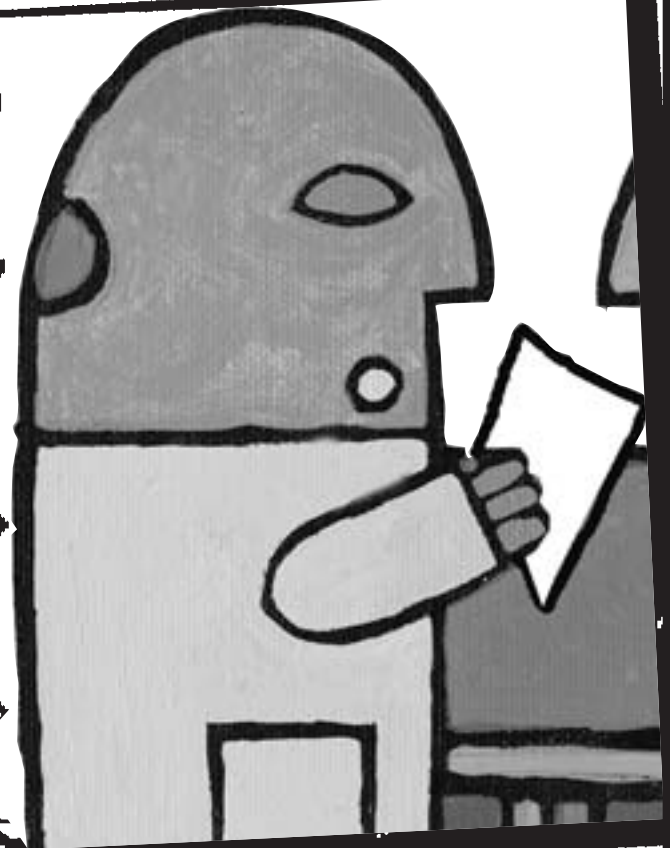
While meetings will differ based on purposes, keep in mind these roles:

Facilitator—Guides discussion and covers the agenda; may or may not be the organizer of the meeting.

Presenter—Shares facts and information relevant to the group; may not be a regular member of the group.

Recorder—Documents ideas, decisions, and actions; may summarize key points for meeting minutes to distribute afterwards.

Timekeeper—Enforces time limits to keep the agenda on track; may or may not be performed by facilitator.



HOW TO DO IT

1. Write an agenda

Create an agenda by basing it on a project work plan or notes and recommendations from a previous meeting, by asking participants to submit agenda items in advance, or by setting the agenda cooperatively with participants at the beginning of the meeting. When developing an agenda, be sure to have the meeting's purpose clearly defined. Every agenda item should support the purpose. That will make it easier to steer tangent conversations back on-topic.

2. Arrange the room

Arrive early to the meeting. Consider rearranging the chairs so they are in a circle or, if using tables, place the tables in a triangle formation. Give everyone the opportunity to see everyone else's face.

Bring to the meeting any necessary supplies such as extra copies of the agenda, maps, surveys, or worksheets; a flip-chart with markers; extra note-pads and pens for participants; refreshments; and a projector or other audiovisual equipment.

3. Be (or find) a good facilitator

Don't compete with group members. Give their ideas precedence over yours.

- Listen to everyone. Paraphrase but don't judge.
- Don't put anyone on the defensive. Control the dominant people without alienating them.
- Keep notes on flipcharts or a board that everyone can see.

- When time for an agenda item has run out, ask the group to decide if discussion should continue and other items dropped or if the discussion should be postponed.
- Realize that your interest and alertness are contagious.

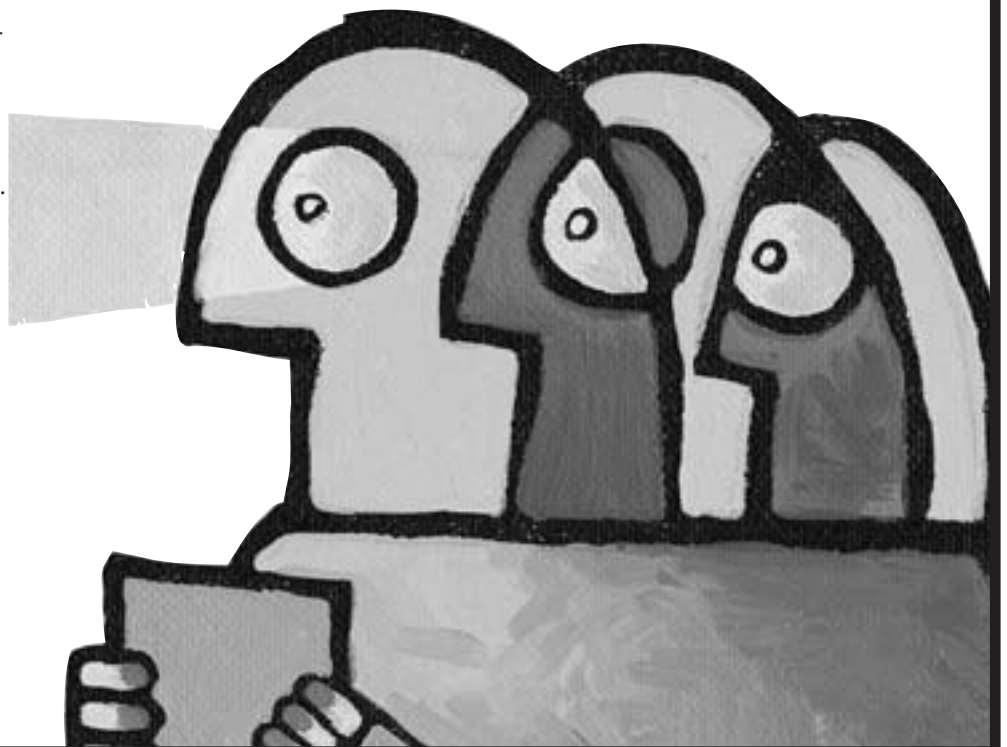
4. Open the meeting

It may be necessary to spend the first few minutes of the meeting warming up: allow participants to share with others what issues they are putting aside in order to focus on the meeting or do a quick icebreaker like answering the question: "What words would be on a bumper sticker that tells the world how your week has gone?"

Next, review the agenda. Does everyone agree to its items and their importance? Add or delete and modify time allotments as appropriate. This step helps people know exactly what work needs to be done. Be careful of not allowing discussions about an issue to erupt when the question is just the placement of the issue on the agenda.

5. Wrap it up

At the end of the meeting, review any decisions made and/or any tasks assigned. Make sure every participant knows what is to be accomplished, by whom, and by what date. This information should be included in meeting minutes. This is also a good time to determine the date for the next meeting. Or, if it a regularly scheduled event, like the third Wednesday of each month, remind participants of the date. Then get initial thoughts about the next meeting's agenda: should a guest presenter be invited? Are there topics from this meeting that need further discussion at the next? Is the information that is necessary for the next meeting going to be available ahead of time?



Use It If...

- You want diverse views in regards to an issue or decision.
- You have information to share with many people. Consider sending those who were not able to attend a summary of the information and discussion.
- You are overseeing a project that requires work by a lot of different people and committees and need time for each of the groups to learn what others are accomplishing.

Forget It If...

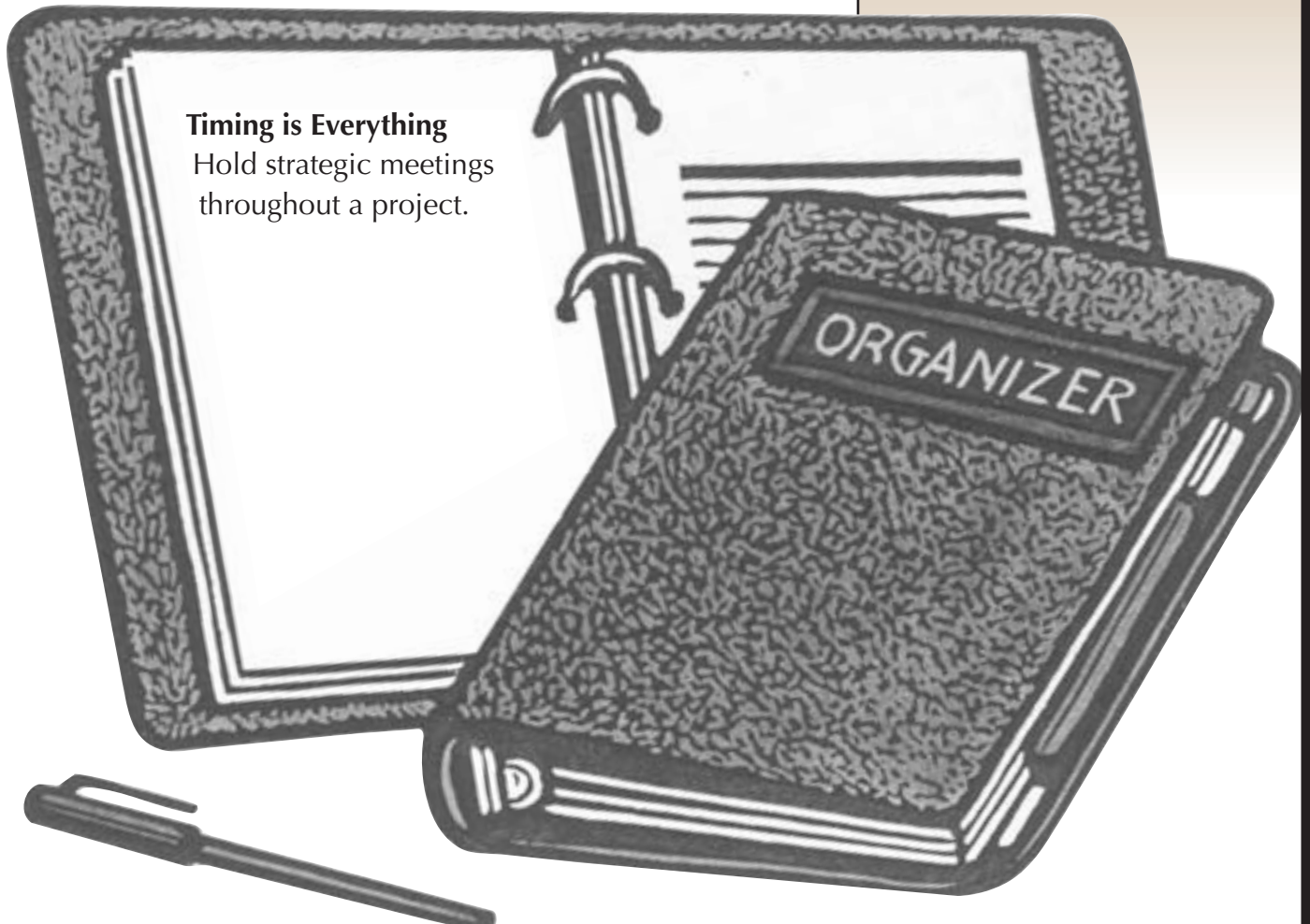
- You are going to make a certain decision regardless of what input you receive.
- You do not have necessary background information ready. For instance, if the purpose of the meeting is to review a landowner survey, but the results are not yet tabulated, postpone the meeting until everything is ready.



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Timing is Everything

Hold strategic meetings
throughout a project.



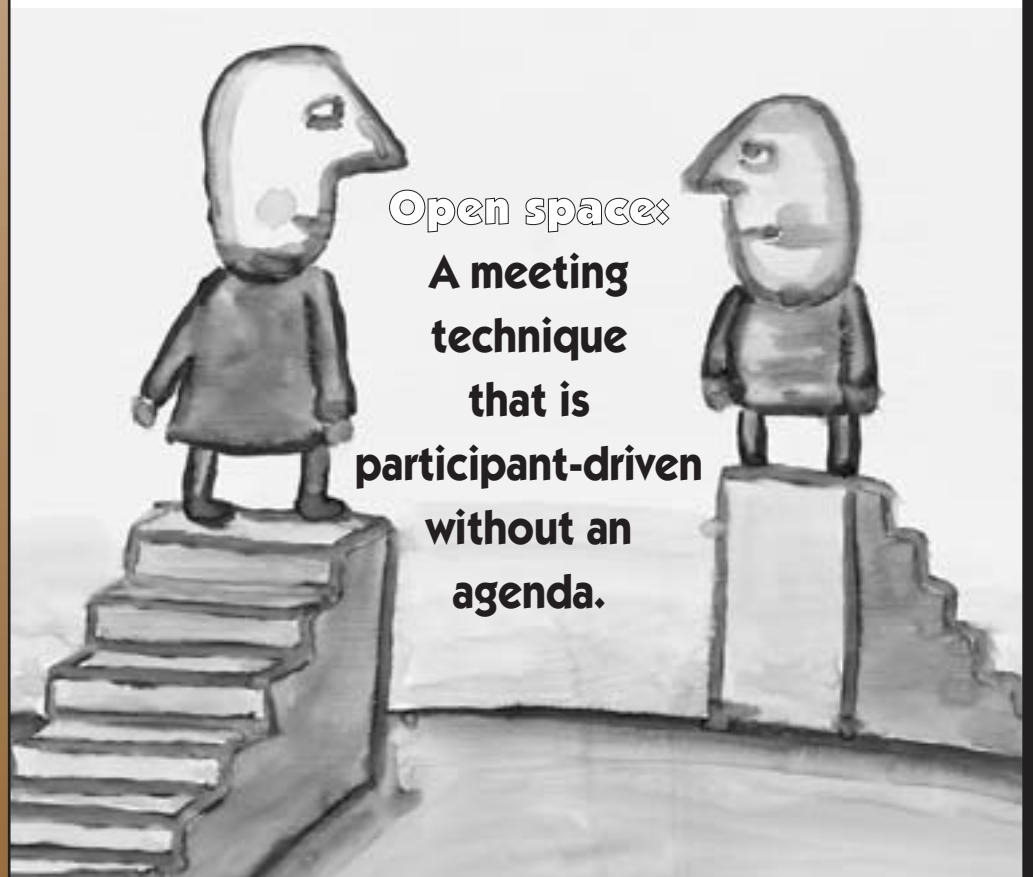


COMMUNITY TOOL BOX

Open Space

WHAT WE'VE FOUND

The words “open space” most commonly refer to landscapes that are natural or free of human structures. So, too, is open space as a meeting technique: it is free from outsider intervention. Participants decide what to talk about, what decisions to make, and what actions to take. These reflect the community’s priorities; they are not necessarily the same as what we would have chosen. It does create a certain level of chaos, but with that can come exciting, passionate, energy all focused on a resource or project.



JUST THE FACTS

Open space helps to create a self-organizing system. There are no agendas, no scheduled guest speakers, and no limitations on discussions. There is a general facilitator who calls the people to action, clearly describes what is to happen, is available to answer questions, and keeps watch on time. The technique can be used for groups ranging in size from 15 to 1500 people. The only requirement is that attendees bring a complete willingness to participate.

By not having an agenda or a facilitator to direct every step, participants will naturally discuss, debate, choose, decide, and take

action on those things that are most important to them. If the group is large, leaders will emerge to take on a specific topic, forming breakout groups to discuss different issues or ideas. Participants choose among the groups where to spend their time and contribute. Each of the groups may come to their own resolutions or decide upon actions to take while preparing a summary of their findings and recommendations.

When running open space meetings, keep in mind:

- Even though anything goes in regards to discussions, everyone needs to listen to and respect other's perspectives and opinions.

- Encourage people to freely move among breakout groups when ever they wish—cross-pollination is beneficial!
- The focus should stay on one theme: a community, a resource, a project, etc. While conversations may get theoretical, be careful of being too vague or trying to take on issues that cannot possibly be solved by the group.

MARKETPLACE OF IDEAS

Time	Place	Topic	Sign-ups
9:30-11:00	Patio		
9:30-11:00	Lunchroom		
9:30-11:00	Front left corner of main room		
9:30-11:00	Back right corner of main room		
11:45-1:15	Patio		
11:45-1:15	Lunchroom		
11:45-1:15	Front left corner of main room		
11:45-1:15	Back right corner of main room		

1. Take care of logistics

- Select a date and time that is going to be convenient; it may be preferable to run the meetings over two or three days.
- Find a place that is large enough for the expected crowd including separate areas for breakout groups. Possibilities include houses of worship and other community centers, conference centers and hotels. Cost for room rental may be an issue.
- If this is not going to be with a pre-defined group such as task force, identify key individuals and organizations to invite. Invite them via phone, mail, or e-mail giving the participants as much notice as possible. Decide how much to describe the meeting in advance: it could turn-off participants because they do not understand. Do provide an introduction to the topic and easy-to-read directions to the meeting place.
- Prepare any visual aids that will help discussions such as a slide show or an enlarged map of the area being discussed.
- Arrange for refreshments and food, if it will be served. This is a good area to get others involved in.
- Obtain supplies needed for information gathering and reporting such as easels, flipcharts, pens, colored dots, sticky pads, tape, audiovisual equipment, etc.



2. Create the scene

- Set up the room by forming a large circle of chairs. Have flipcharts or paper, pens and tape in the center of the circle.
- Hang several sheets of paper on the wall and title them "Marketplace of Ideas." The paper should be divided into 60 or 90 minute time slots with breakout spaces such as separate rooms, corners within the meeting room, etc. (The total number of places and times should be roughly equal to the 25 percent of the total number of attendees.)

3. Open the floodgates

- When everyone is convened, describe what is to happen. Invite participants to reflect on issues and topics that they feel passionate about, passionate enough to lead a breakout discussion.
- As people come up with items, they step into the circle, write their topics on paper,

and announce them to the whole group. Then the leader proceeds to the "Marketplace" and signs up for a time slot and place. When everyone who wants to post a topic has done so, the entire group is invited to sign up for sessions.

- People will choose, discuss, and rearrange times and places if necessary. When done, it should be time for the first groups to meet.
- New topics can be posted at any time, and everyone should be encouraged to change groups at any time. (This process is repeated each new day of the meeting.)

4. Prepare summaries

- The groups are asked to fill out one-page summaries of their breakout sessions including the topic covered, attendees, findings, and recommendations. At the end of the meeting, everyone reconvenes and the leaders from each subgroup offer a brief verbal report, which can range from very brief comments to 10 minutes for each person depending upon the number of breakout groups.
- If possible, have computers on-site for typing up breakout group summaries or make photocopies of printed summaries so that participants can take home a product from the gathering. Another alternative is to mail summaries afterwards and include a note thanking the participants.

Use It If

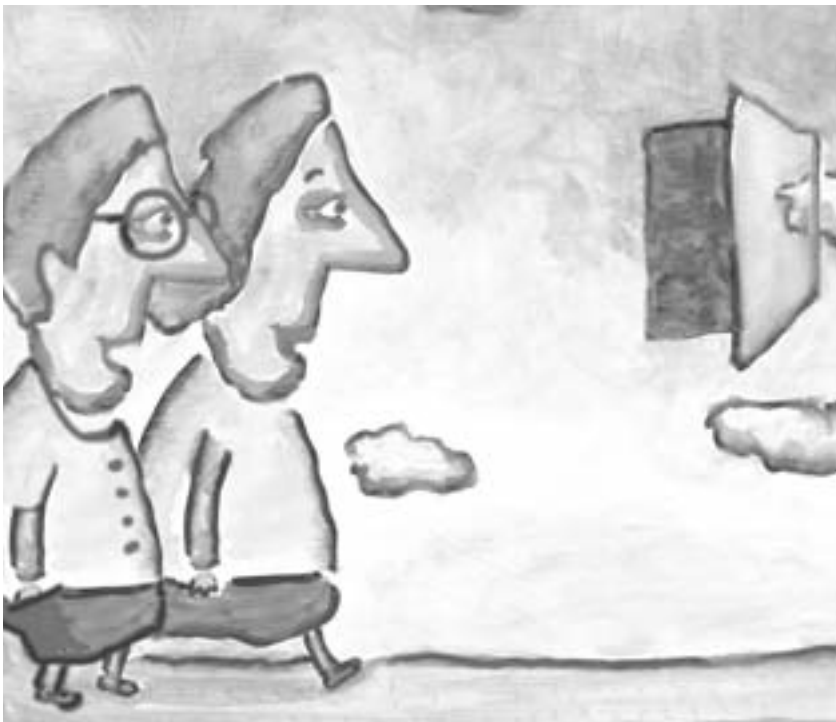
- You want people to feel more comfortable with each other to share their dreams, visions, and ideas.
- You are looking for a way to enliven a longstanding, regularly scheduled group meeting, such as a task force, by doing something unexpected.
- You need for participants to drop pretenses and/or political agendas and to express what matters most to them.

Forget It If

- You have specific items that need to be addressed, decisions made, information to share, or a critical deadline.
- You find resistance among the group or participants perceive it is a waste of their time.
- You are involved in a highly controversial project where the audience will be composed primarily of two opposing groups.

Timing is Everything

Use the open space technique in the beginning of a project to generate information, feedback and enthusiasm. Use it in the middle of a project as a re-energizer.



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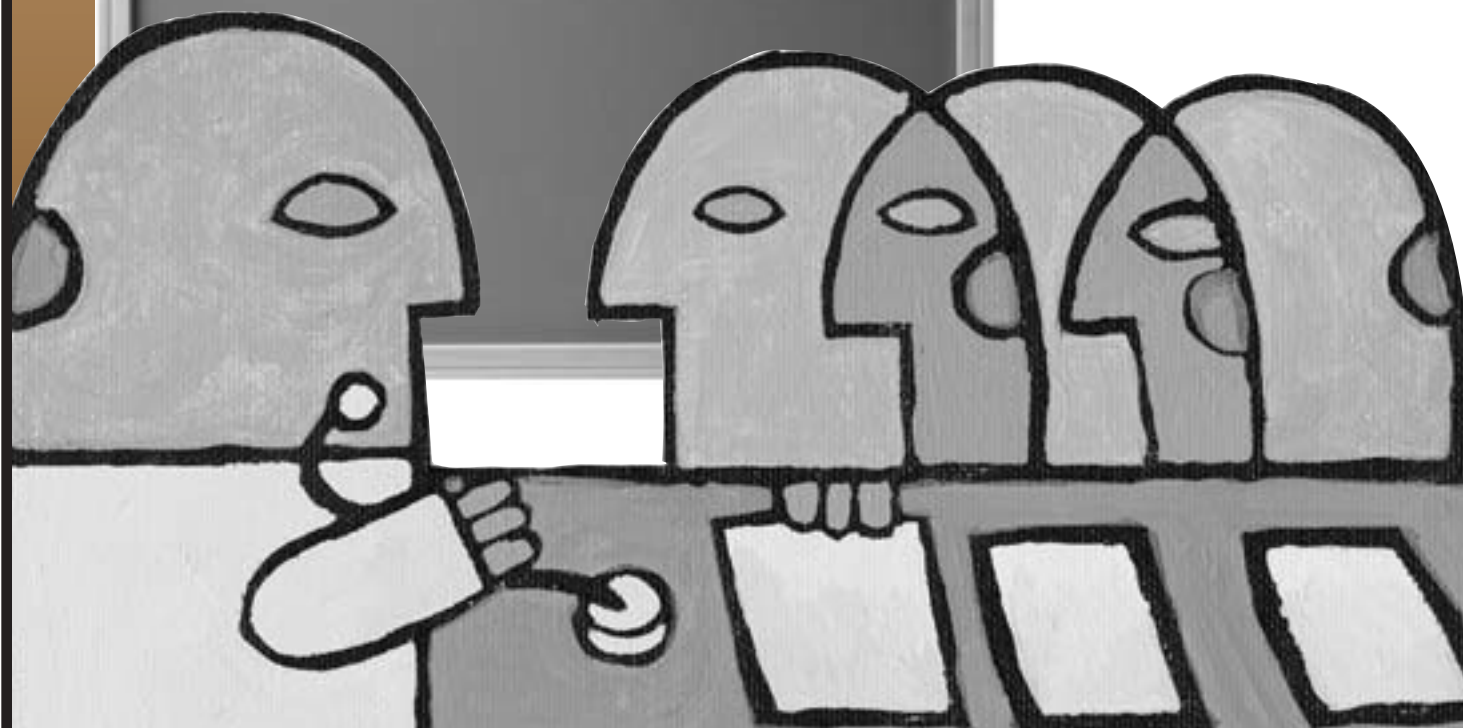
Workshops

What We've Found

Workshops are a great opportunity to bring together a diverse audience and have them generate ideas, share and gather information and get work done. The mixture of large-group presentations and small-group interactive sessions allows for greater participation and encourages open dialogues.

Workshops: A combination of presentations and interactive sessions that bring people together to work towards a consensus on an issue or topic.

Workshops need strong facilitation to ensure there is good communication and active listening among attendees so that a consensus can be reached.



JUST THE FACTS

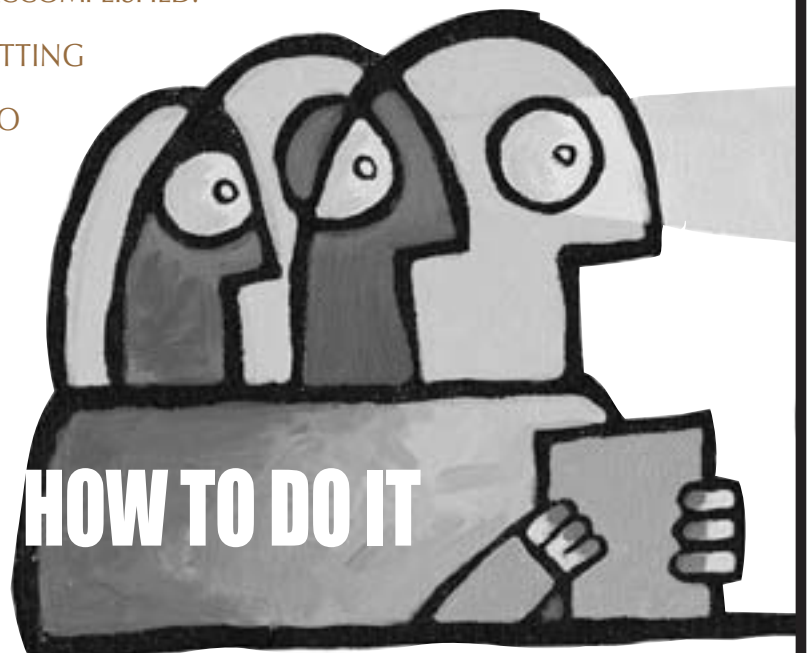
WORKSHOPS CAN LAST A FEW HOURS OR EXTEND OVER SEVERAL DAYS. THE NUMBER OF PARTICIPANTS CAN RANGE FROM A DOZEN TO THE HUNDREDS. IT ALL DEPENDS UPON THE AREA, THE RESOURCE, THE PURPOSE FOR THE WORKSHOP AND PEOPLE'S INVESTED INTERESTS.

DURING A WORKSHOP, REAL WORK GETS ACCOMPLISHED. FOR INSTANCE, AN ISSUES AND GOAL-SETTING WORKSHOP MIGHT HAVE AS ITS PURPOSE TO DEVELOP A WORKABLE STRATEGY FOR THE PROJECT THAT INCORPORATES THE VIEWS OF COMMUNITY MEMBERS, BUSINESSES, & GOVERNMENT OFFICIALS.

THE WORKSHOP WOULD BEGIN WITH INSTRUCTION OR TRAINING ABOUT WHAT IS GOING TO BE ACCOMPLISHED AND HOW. THE ATTENDEES ARE GIVEN BACKGROUND INFORMATION, AND WHAT THE IMPETUS IS FOR HOSTING THE WORKSHOP AND THEN THEY WILL GET TO WORK. THEIR WORK MIGHT BE TO REVIEW A REPORT AND DECIDE UPON RECOMMENDATIONS OR BRAINSTORM IDEAS FOR ACTIONS.

1. Form a small planning group

Bring together key players to start planning a workshop. Brainstorm topics, formats, and schedule. Also discuss learning objects, desired outcomes, and follow-up. Then define the purpose and create an agenda. This group may be comprised of members from an organization that will be hosting the event and those who will help facilitate.



HOW TO DO IT

2. Do Logistics

- Select a date and time that is going to be convenient (i.e., evenings or weekends, not on a holiday).
- Find a place that is large enough for the expected crowd including separate areas for breakout groups. Possibilities include community centers, places of worship, conference centers and hotels. A place with low or no cost is usually desirable.
- Identify key individuals and organizations to invite and decide how to invite them (e.g., phone, mailed invitation, speaking at

their groups' meetings, etc.).

Then make invitations with as much notice as possible supplying details such as when, length of meeting, where it will be held (including directions) and a brief statement of the purpose.

- Contact and confirm attendance of special speakers such as resource experts, elected officials, and government agencies.

- Obtain supplies needed for information gathering and reporting such as easels, flipcharts, pens, colored dots, sticky pads, tape, audiovisual equipment, etc.
- Write out any guidelines or expectations for behavior; e.g., not interrupting others, not offering judgment, etc. This list should be posted in the meeting room.
- Make copies of the agenda or post a large copy that every one in the room will be able to see.

- Community Action (2 hours minimum). This is when participants will generate and agree on practical, tangible steps that are needed for the resource. This is often referred to as a Project Action Plan. The large group is again broken out into small groups with a facilitator and recorder. The small groups brainstorm then prioritize their lists of actions. Each small group shares with the large group, and the large group comes to a consensus about the overall priorities.

WHEN RUNNING WORKSHOPS, KEEP IN MIND:

- **There must be a clear purpose, with clear tasks that will accomplish that purpose.**
- **Participants will need coaching on how information will be generated and recorded.**
- **Breakout groups should be no larger than 15 and every group needs a facilitator.**
- **Everyone needs to listen to and respect other's perspectives and opinions.**

3. Run the Workshop

While the actual format can vary, following is a suggested agenda:

- Information Presentation to large group (30-60 minutes) to ensure workshop participants have a working knowledge of important information about the project area such as important resources, current issues or threats, opportunities, and impediments.
 - Information Sharing through Community Dialog (1-2 hours minimum) to gather information about issues, opportunities and needs for a project. This is done in small groups with a facilitator and recorder for each group. Notes are taken on flipcharts and then posted on the wall for all to see. This session culminates with a representative from each small group reviewing their thoughts and feelings for attendees.
- Identify and ask facilitators. Make contingency plans for having the largest group possible and estimate the number of small groups and thus the number of facilitators.
 - Prepare any visual aids that will help discussions such as a slide show or an enlarged map of the area being discussed.
 - Arrange for refreshments and food, if it will be served. This is a good area to get others involved in.

- Meeting Summary (15-30 minutes)

for the large group. The day's leading facilitator presents a final summary of the findings, offers any appropriate observations about the process and experience, explains how the information will be used and what happens next. Finally, recognize the small group facilitators and thank all of the participants for their time, energy and brainpower.

4. Follow Up

The planning group should determine how results from the workshop are going to be handled. Will they be published in a brochure or book? Will they be submitted to a local newspaper? Will they be reviewed at another meeting? In addition, facilitators should be thanked in writing, as should anyone who volunteered or donated items (like food).

Use It If...

- You want to build consensus. Through a workshop, people can express specific viewpoints, debate issues and come to agreement on a course of action.
- You want to reach a lot of people and involve them in defining priorities.
- You have a group that is trying to get started and is looking for direction and support from the community— and have fun while doing it.

Forget It If...

- You don't have a diverse group to attend. You don't want everyone to belong to the same conservation group or the same residents association. The outcomes will be one-sided.
- You already have the final answers. Your work will lose credibility if you seek opinions and then ignore them; the workshop will lose credibility if you try to control the outcome.
- You are trying to reach a specific group or under-represented group. This type of public forum may be too intimidating for some to express their true thoughts. Consider a focus group instead.

Timing is Everything

Use workshops when real work needs to get done.

- In the beginning of a project, discover the issues and develop a consensus on future visions.
- In the middle of a project, use workshops to disseminate information about results of surveys or study findings to decide upon next steps or determine priorities.



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