



**Planning Associates 2012
Team 1 Practicum:**

**What to Expect When You're Expecting a Charette
A Pre- and Post-Charette Communication Plan**

17 September 2012

**Marty Kuhn
Heather Morgan
Sara O'Connell
Nancy Parrish
Tiffany Vanosdall**

Executive Summary

Practicum Thesis

Our approved proposal consists of the following:

Our product is a **Pre- and Post-Charette Communication Plan** titled *What to Expect When You're Expecting a Charette*.

The Pre-Charette component includes SMART Planning education in an interactive way, expectations for the charette, roles of everyone involved, charette logistics, and lessons learned from previous charettes.

The Post-Charette component includes lessons learned from that charette and provides an opportunity for feedback from all participants. The feedback would be documented and accessible for all future charettes.

To ensure that these items are accomplished, HQ will designate a Charette Advocate responsible for conducting pre-charette education and gathering post-charette feedback. These advocates could be Planning Associates, 17+1 Team members, or SMART Planners – someone from a group who understands and embraces the charette process for SMART Planning rescoping.

Although we have developed our product independently, we have reviewed the *SMART Planning Charette Handbook (Draft August 2012)* to ensure that they complement each other.

Practicum Project Deliverables

Practicum Presentation to HQ

Audience: HQ

Format: Powerpoint

Pre- and Post-Charette Communication Plan

Audience: The Charette Advocate¹

Format: Document

Pre-Charette Workshop Framework

Audience: The Project Delivery Team (PDT) entering the charette process²

Format: Powerpoint with notes, exercise, and handout

¹ Although the intended audience of the Pre-Charette Communication Plan is the Charette Advocate, it may be useful information to share with others, including the DE, Corporate Board, or Chief of Planning.

² It may be useful for other charette participants, including the nonfederal sponsor and vertical team, to attend the workshop, but the PDT is the primary audience.

Who is the Charette Advocate?

The Charette Advocate plays a vital role in the Pre-Charette Workshop. The objective of the workshop is to help ease the transition into SMART Planning and promote a successful charette. The Advocate serves as an interpreter between those leading the SMART Planning movement and those on the ground who must comply with it. Although many resources have been made available to teach SMART Planning and explain our new direction, face to face communication is the best way to complete the knowledge transfer. The Advocate is in a special position to supplement the message already broadcasted, more easily heading off misunderstandings, answering questions, and generating enthusiasm.

The Advocate position is neither to be filled by a single individual nor a large cadre of new hires. It's simply another role, rotating by charette, for the facilitation team or other SMART Planning experts to step into. The Advocate can be from within the District or Division, but they should not be a member of the charetting PDT, as this is a position with too much preexisting bias. However, another SMART Planner from the District is an appropriate choice. Advocates need only be well versed in SMART Planning and have been through the charette process. Since there will be SMART Planners well distributed throughout the Corps, it will be easy and cost effective to recruit a local Charette Advocate for each charette.

The Charette Advocate is not expected to attend the charette. Other experts and facilitators play the guiding role at the charette. The Charette Advocate's focus is on preparing and teaching prior to the charette and capturing the feedback that comes from the charettes. The time commitment is minimal – one to two days per charette. Preparation involves touching base with the District Liaison and reading Lessons Learned from prior charettes. Then the Advocate leads the half day workshop. After the charette, the Advocate will manage feedback, compiling Lessons Learned in a clearinghouse where it is consistently available to future advocates and facilitators. The Advocate does not write an After Action Report; that is left in the hands of the PDT and the facilitators.

While the critical role of the Charette Advocate is to prepare the PDT for their charette, it is quite possible that other benefits will arise from this position. The promotion of the SMART Planning charette should raise enthusiasm and understanding that will spread through the districts. Those who fill the Advocate role should be kept tightly integrated with leadership and well informed of any new direction. Eventually, this cadre of Charette Advocates may shift into the more general role of SMART Planning Advocates.

A Few Notes on the Implementation of the Pre-Charette Workshop

Efficient and Cost Effective

Our objective is to recommend a plan that will greatly increase the success of the SMART Planning Charettes while remaining cost effective. In fact, the proposed Pre-Charette workshop may be one of the most powerful tools a district has to educate the masses on the SMART Planning process in a relatively cost effective manner.

Vertical Team Involvement

What to Expect When You're Expecting a Charette was written under the assumption that the Vertical Team will be represented at the charette. Although some charettes have been held without the Vertical Team, we believe that a true SMART Planning Charette gets much of its benefit from the participation of the Vertical Team. PDTs who are holding their own independent rescoping meetings may benefit from the Pre-Charette Workshop material, but they are not the principle audience for whom this presentation was designed.

Live vs. Webinar

The Pre-Charette Workshop should be executed in person. The objectives of raising enthusiasm and increasing understanding are best done in person, and this is a crucial step for the morale and unification of the PDTs. As the need for the Pre-Charette Workshop is diminished, some of its contents may be phased into a webinar or prospect training. However, as the charettes are initially being rolled out, a webinar is not a good approach and would be acceptable only if the entire PDT could participate together in one room. The collective environment enhances learning, promotes attentiveness, and builds team spirit.

Ongoing Training

The Pre-Charette Workshop should not be seen as a one-time training in the District for everyone (planners and other CoPs), rather it will be held prior to each charette for each PDT. The workshops should be lead for each charette until the ideas have firmly taken hold and an understanding of our direction and approach has fully dispersed from Headquarters through the rest of the Corps.

Evolution of the Pre-Charette Workshop

The Pre-Charette Workshop will evolve as SMART Planning evolves and as more Corps employees gain exposure to the ideas. The level of explanation will shift, and eventually the workshop may be greatly scaled back, but at this stage, as charettes and SMART Planning are being rolled out and still new in the eyes of many, it will be a key part of the process for gaining support and momentum.