

# Partnership *for* Sustainable Communities

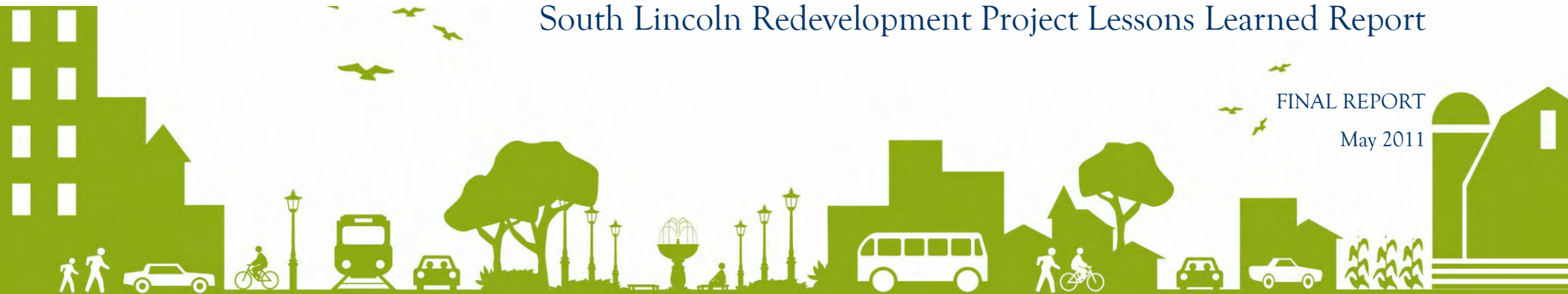


**DENVER, COLORADO**

## South Lincoln Redevelopment Project Lessons Learned Report

FINAL REPORT

May 2011



**Prepared Under:**

Contract No. EP-W-07-023

**Prepared for:**

U.S. Environmental Protection Agency  
Office of Solid Waste and Emergency Response  
Office of Brownfields and Land Revitalization  
Washington, DC 20460

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## Partnership for Sustainable Communities



## Table of Contents

<b>1. Introduction</b>	<b>1</b>
<b>2. Lessons Learned</b>	<b>2</b>
2.1. Creating a Leadership Team	2
2.2. Commitment to Collaboration and Co-Evolution	2
2.3. Defining Success	2
<b>3. Lessons Learned from the Pilot Project</b>	<b>3</b>
3.1. Overall	3
3.2. Energy Charrette	4
3.3. Transportation Charrette	5
3.4. Stormwater and Green Infrastructure Charrette	6
<b>4. Lessons Learned: The Charrette Process</b>	<b>7</b>
4.1. Tips and Guidelines for a Successful Charrette	8
<b>5. Conclusions</b>	<b>11</b>





# 1. Introduction

The Sustainable Communities Brownfield Pilot is led by the U.S. Environmental Protection Agency (EPA) Office of Brownfields and Land Revitalization (OBLR) and the Office of Sustainable Communities (OSC), and is supported by the EPA, Department of Housing and Urban Development (HUD), and Department of Transportation (DOT) Region 8 Partnership for Sustainable Communities (Partnership). These agencies are working together to ensure federal resources and policies support the development of sustainable communities. The Partnership is based on “livability principles” that guide inter-agency collaboration and support the integration of safe, reliable and economical transportation; affordable, energy-efficient housing; and sustainable reuse of unoccupied or underutilized land. Pilot communities were selected by EPA’s Brownfields Program with input from HUD and DOT, to receive technical assistance and support from these agencies to build on past agency investments, identify opportunities to connect housing, transit and brownfields within the development, and to coordinate resources that can further the integration of sustainability. The South Lincoln Redevelopment Project (SoLi) was selected as one of these Pilots in 2010.

SoLi consists of the redevelopment of 270 Public Housing units on 17.5 acres in the La Alma/Lincoln Park neighborhood of Denver, Colorado. Using an integrated design and construction process that promotes economic, environmental, and social vitality, the Denver Housing Authority (DHA), an affordable housing provider, is creating an energized transit-oriented community where people choose to live and experience environmental sustainability, cultural diversity, proximity to downtown, and a spectrum of housing options. As part of the project’s integrated design process and with support from the Partnership through this Brownfield’s Pilot, SoLi hosted three charrettes that focused on key issues within sustainability: energy, transportation, and stormwater and green infrastructure design to enhance the design and build-out of the project. These charrettes brought together stakeholders to define project goals, brainstorm strategies, funding opportunities and partnerships, and identify barriers and next steps for strategy implementation and modification of their project design.

In recent years, the SoLi project has received much collaborative support from state, local and community stakeholders and leaders in defining and establishing its concept and goals. In 2008, prior to being selected as a Pilot project, a 3-acre portion of the SoLi site (at 10th & Osage, included as part of Phase 1 of the project) received funding from EPA’s Brownfield Cleanup grant program to cleanup the area to unrestricted residential use cleanup standards. In September 2009, the DHA and key project team members finalized a Master Plan for SoLi focusing on land use, energy, transportation and public health. In addition, this Master Plan identifies sustainability goals as integral to the project vision (to view the SoLi Master Plan, go to:

[www.denverhousing.org/development/SouthLincoln/MasterPlan/Pages/default.aspx](http://www.denverhousing.org/development/SouthLincoln/MasterPlan/Pages/default.aspx)). Previous federal investments included a \$10 million American Recovery and Reinvestment Act (ARRA ) HUD grant for construction of the first building and a light rail station.

SoLi is a transit-oriented development that strives to be as energy efficient as possible in order to decrease utility bills for its units and reduce the project’s carbon footprint. Since the cost of housing and transportation has a direct impact to household budget, one goal of the project is to incorporate strategies that emphasize energy use reduction in order to decrease the cost of living for residents. In addition, as SoLi is a 5-phase project, the phasing of housing and development will need to be carefully evaluated in order to determine an approach that minimizes the displacement of current residents, maintains affordability and culture of the neighborhood and community, and effectively incorporates strategies that can be implemented as part of a phased-project.

A number of key lessons, including new opportunities and barriers, have been learned through the SoLi Pilot project charrettes. This document is a summary of these lessons and is intended to serve as a resource for stakeholders to transfer to other communities undergoing a similar process of community engagement and integrated design.





## 2. Lessons Learned: The Partnership/Interagency Perspective

The Partnership's support of the SoLi project has created an opportunity to leverage the strengths and resources of the three Partnership agencies with those of state, local and private partners. The SoLi Pilot project charrettes provided a hands-on opportunity for participants to understand the agency processes, programs and funding opportunities available within each of the key organizations represented, as well as identify program and funding gaps that may exist within such a project. It provided a real-world experience of how federal and state funds and resources both directly, and often indirectly, come down to a local project level. The lessons below outline the processes, resources, and recommendations for supporting projects similar to SoLi.

### 2.1 Creating a Leadership Team

The participation of all three federal agencies is essential to the success of this Pilot, and its ability to convene state and local agencies, and resources. On individual projects, it is important to create a Leadership Team that has representatives from all three agencies and key state and local representatives, to participate in the planning, goal-setting, and management of the project. Within this Leadership Team it is also important to select a single agency and individual who will act as the overall team lead and define roles and responsibilities for the other team members. The team lead should have the time and commitment to oversee the project from beginning to end and sustain momentum when the project slows down or runs into challenges. For the SoLi Brownfields Pilot, EPA was the lead. DHA was a strong co-lead and participant.

### 2.2 Commitment to Collaboration and Co-Evolution

All participating agencies have varying approaches to programs, funding mechanisms, organizational structure, and staffing. These differences pose challenges to intra-agency collaboration. Because of these challenges, collaboration and consensus building have been key elements to this Pilot's success. This willingness and commitment to work with a continuously evolving process has been pivotal in realizing the potential of these charrettes and recognizing the capabilities and roles of the individual agencies. Additionally, in an effort to find joint solutions, it is important for team members to consider strategies that fall outside of the current policies and procedures of any one agency. Additionally, each agency should commit dedicated staff and resources to the project. It was also important to include goals of future benefits and transferability, as state and local agencies are more engaged if the strategies developed, can be applied to a broader range or regional projects.

### 2.3 Defining Success

Each agency defined "success" within the context of the project, and focused on additional analysis and key decisions that would allow DHA to confidently modify their project design. From here, the Leadership Team will come together to develop a joint definition of success. This joint definition should identify a successful outcome for all three agencies and guide project goals and agency responsibilities.





### 3. Lessons Learned from the Pilot Project

The three SoLi sustainability charrettes provided an opportunity to engage the community and key stakeholders. This process explored opportunities and barriers to key strategies, the impact of city policies and regulations, and means to implementation.

The following are overall lessons learned, specific lessons learned from the three individual charrettes, and tips and recommendations for facilitating the charrette process.

#### 3.1 Overall

- **Build upon existing plans:** Use existing plans and design ideas to establish the context and a clear starting point for new ideas and discussions. A thorough review of existing plans can help push a project beyond this already identified baseline and prevent teams from rehashing old conversations. At SoLi, the team used the existing SoLi Redevelopment Master Plan and La Alma/Lincoln Park Neighborhood Plan as a starting point from which existing design ideas could be further developed and new ideas could be generated.
- **Resident and stakeholder buy-in is critical:** Resident and stakeholder buy-in is important for the successful implementation of many sustainability strategies and initiatives. Efforts that encourage resident engagement, education, and feedback will likely be more successful. At SoLi, DHA has organized numerous community meetings, surveys, and work sessions with residents and neighbors to collect valuable feedback and input for project decisions. Additional ideas for resident engagement at SoLi include a green jobs program, green store / resource room, and green team for training and ongoing operations/maintenance. Although the charrettes were “technical” in content, DHA strongly represented the resident perspective.
- **Think beyond the property line, invite neighbors to increase collaboration:** The SoLi Pilot charrettes convened major neighborhood partners (the regional transportation authority, neighboring university campus, etc.) to collaborate with the project team and key stakeholders. This is particularly important because the implementation of neighborhood scale solutions such as stormwater management and district energy systems will impact areas beyond the SoLi project boundary, making buy-in from neighborhood partners critical.
- **A central repository for project, documents, ideas, and feedback can promote effective implementation:** Large-scale development projects take years to design and construct. This long time frame can make it easy for teams to forget past ideas and recommendations. Formal master plan documents can capture a snapshot of high level goals and efforts but there is also value in hosting an ongoing repository and forum for project documents, ideas, and feedback. Such a repository can act as a “real-time” resource for project updates, lessons learned, case studies, implementation strategies, ongoing feedback, and funding resources for the project. The repository and forum can engage viewers by being interactive and easily accessible, and supported through a dedicated funding source.
- **Participation from local agencies is critical:** Without local agency support, great plans and projects will remain shelved. The Partnership for Sustainable Communities can help build support at the local level as well as the federal level.
- **Ensure strong expertise comes to the table:** Find key public/private experts that have a broader perspective to lend their expertise to the charrette process.





### 3.2 Energy Charrette

- **Discounted energy bills do not promote resident energy savings:** Many affordable housing residents do not directly pay their energy bills and/or have a cap to their monthly energy costs, regardless of how much energy they use. This structure limits resident knowledge of energy consumption and does not allow for incentives to reduce their energy usage. Projects working under a similar structure need to explore opportunities for residents to reduce their energy usage.

**Next Step:** Identify process by which HUD projects can incentivize energy use reductions with resident energy bills. One strategy could include a baseline energy allocation, for which residents do not have to pay, after which energy is billed at an increasing rate. Further, residents that use less than the budget could earn credits towards rent, food, etc.

- **Provide mechanism for using future energy cost savings to fund first costs of energy efficient strategies:** On most development projects, there is a disconnect between the funds allocated for first costs of energy efficiency measures and the funds gained through energy savings by those measures. The approach should prioritize expenditures that realize long-term savings. Projects that can identify potential partners and explore financing strategies to fund upfront costs may be able to reduce total cost through long-term energy savings.

**Next Step:** Create a mechanism for monetizing life cycle savings and using this to fund first costs for energy efficiency strategies that have attractive payback periods.

- **Transit Oriented Development (TOD) densities create energy tradeoffs:** TOD projects are generally mixed-use high-density developments. In urban environments, higher density means higher buildings that can reduce solar access in the dwelling units and shade rooftops so they are not optimized for solar panels. Projects should consider these energy tradeoffs and develop massing and orientation studies to maximize solar access across the development for the chosen development density.

**Next Step:** Develop renewable energy targets for affordable housing projects that adjust based on the project density. Don't be myopically focused on building energy goals at the expense of creating a vibrant urban setting which has larger energy and environmental benefits (from reduced use of personal vehicles, land use, etc.).

- **Meet and work with local energy provider:** Working side by side with the local utility is important when pursuing large-scale and advanced energy strategies. Engaging the utility to provide guidance on rate structures and permitting of large-scale capital projects (such as cogeneration), greatly helps target the analysis to what is implementable. The SoLi team should continue to work with Xcel Energy to support the design strategies and capital costs for large-scale energy projects. As an example, using the Xcel Energy Design Assistance program to identify modeled energy savings, or modifying policy to allow for redevelopment-wide strategies (such as using LED street lights) will have positive benefits for SoLi and other projects.

**Next Step:** Create guide or checklist for development project teams that want to engage their local utility on efficiency and renewable strategies, as well as large scale capital projects such as cogeneration.

- **Coordination of project phasing is critical for success of district energy systems:** Most large-scale developments like SoLi are designed and built in phases, yet most district energy systems require upfront infrastructure investments beyond the scope of the first phase. The SoLi team should develop a phasing plan to ensure successful design, funding, and construction of any district scale energy strategies. This phasing plan will need to be supported by all energy partners and should include provisions for system management, operations, and maintenance.

**Next Step:** Create a phasing plan for the most feasible district energy systems.

- **Ownership and management of district energy systems requires key partnerships:** Creating a district energy system may blur the lines between the developer and energy provider thus increasing the need for coordination between the two. Questions arise such as "Who owns the district energy system?" and "Who will manage, maintain, and operate the system?" need to be negotiated before developing a system. Partnerships with neighborhood organizations and third party providers can improve economics and efficiencies through diversified load profiles and resources.

**Next Step:** Develop a Memorandum of Understanding (MOU) for the SoLi development that clarifies who owns, manages, and maintains any district energy systems.

#### Energy Strategies at Different Scales



#### Metrics and Benchmarks





### 3.3 Transportation Charrette

- **Neighborhood transportation strategies need to consider regional transportation needs:** Transportation strategies that meet the needs and goals of the La Alma / Lincoln Park neighborhood may conflict with city-wide transportation goals and standards. For example, improving pedestrian and bicycle connectivity within the neighborhood could limit automobile movement through the neighborhood. Often, these issues are politically charged and the perception of conflict may be greater than the reality of such a conflict. Quantifying impacts is therefore an important step in implementing goals that may impact other modes of transportation. Also, project-specific measures like custom bike racks may incur additional costs for maintenance and repair that is, in part, why the city generally does not approve them. Projects should identify city and regional plans, processes, and requirements when evaluating the project goals and desired strategies, and coordinate with them as much as possible.

*Next Step: Conduct transportation modeling to better understand impacts on neighborhood connectivity and regional transportation, and use the results to communicate to stakeholders to enhance acceptability of the proposed plans.*

- **Pilot projects can create precedence for innovative technologies:** Pilot projects enable local agencies to test innovative strategies and technologies that are not approved through standard policies and regulations. This creates precedence that can be referenced by other future teams. These pilot projects provide important information regarding design considerations, construction costs and operational realities. Future projects that explore strategies not readily adopted by city guidelines will benefit from these pilot projects.

*Next Step: Establish a mechanism for creating precedence from pilot projects that can be referenced to support future development.*

- **Establish clear metrics and definition of success (or at least as clear as possible):** A measureable definition of success can help define progress for a TOD, yet there is currently no single metric that informs this evaluation. Using guides such as Leadership in Energy and Environmental Design for Neighborhood Development (LEED-ND) credits, Walk Score ([www.walkscore.com](http://www.walkscore.com)), or the Sustainable Sites Initiative ([www.sustainablesites.org](http://www.sustainablesites.org)) to measure pedestrian and bicycle connectivity within a development will help provide more concrete benchmarks. Targets that include prescriptive and performance measures will likely be more effective for defining success and supporting connectivity.

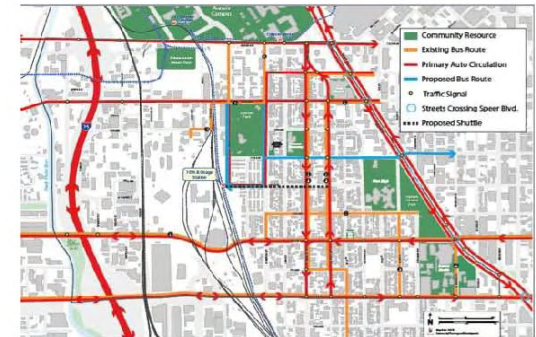
*Next Step: Create a list of established transportation metrics that can be used to define success on future projects.*

- **Establish clear ground rules for developing in the Right-of-Way:** The City of Denver does not currently allow development in the public right-of-way for strategies such as bulb-outs, traffic calming, stormwater measurement, etc. Developers pursuing high-level transportation goals should work with the city to outline a transparent and streamlined process for integrating innovative strategies in the public right-of-way.

*Next Step: Define a specific process and set of criteria that provides clear guidance to developers for designing and building in the right-of-way.*

- **Incentives could push sustainability and connectivity further:** Incentives linked to specific sustainability performance achievements (whether through height or density bonuses, design assistance funding, etc.) that target walkability, bikeability, and/or connectivity, would encourage more projects to target these goals in future developments.

*Next Step: Create incentives that promote improved neighborhood connectivity, bikeability, and walkability.*





### 3.4 Stormwater and Green Infrastructure Charrette

- **Look beyond project boundaries to ensure a comprehensive approach and solution:** Stormwater does not follow property lines. A regional basin or watershed approach to stormwater issues (e.g., flooding, water quality) may allow for a more comprehensive and appropriate solution. Project teams should identify key stakeholders (public and private), in a given region and build partnerships around specific stormwater management strategies and solutions that benefit all parties through regional stormwater improvements and cost reductions.

*Next Step: Continue the dialogue of stakeholders that represent the local drainage basin for the SoLi project.*

- **Identify all key stakeholders and stormwater plans before developing a regional solution:** As discovered at SoLi, a regional stormwater management approach may be challenging when numerous stakeholders (e.g., DHA, Auraria Higher Education Center (AHEC), Regional Transportation District (RTD)) are involved that have different project schedules, funding sources, and priorities, and there is a lack of coordination among the organizations. To inform a project's stormwater management plan, project teams should work with neighbors and those within the watershed to identify the current status and plan around stormwater management, and any actions that may already be taking place.

*Next Step: Create a single list and repository of all relevant stormwater plans and partners.*

- **Identify priorities and tradeoffs between water quantity and water quality solutions:** Different approaches may be necessary to address flooding versus water quality. Projects may identify strategies that improve water quality but do not mitigate the volume of stormwater flowing off of the site. Projects should balance water quantity and quality strategies based on the needs of the site, opportunities within the neighborhood, and impacts on the regional watershed.

*Next Step: Develop a decision tree that helps project teams prioritize stormwater quality and quantity.*

- **Define clear goals and metrics of success:** It is important to define a clear goal for water quality and quantity improvements for a development and regional basin. A range of metrics exist from LEED-ND and LEED for New Construction to Green Communities to local regulations. The project team should be clear about which metric is the appropriate definition of success for both quality and quantity.

*Next Step: Create a list of established stormwater metrics that can be used to define success on future projects.*

- **Collaboration and prioritization among city players is crucial for the successful implementation of solutions:** Collaboration is needed within the local Partnership agencies and stakeholders on the various city plans that may affect the SoLi project (e.g., some agencies may identify other projects as a priority even though major city and private investments are being concentrated in this neighborhood and redevelopment effort).

*Next Step: Create a recommended protocol and checklist that promotes better collaboration between city agencies.*

- **Innovative solutions may require research and testing:** More research/data is needed to determine the health and safety risks (e.g., tripping hazards, standing water, and emergency vehicle requirements) associated with green infrastructure best management practices.

*Next Step: Identify research institutions that can support pilot projects pursuing innovative strategies and document the results in a manner that will be useful to different projects in different climates.*

- **City policies may limit the implementation and effectiveness of some stormwater strategies:** Current Denver city policies may be impeding effective stormwater management strategies from being incorporated into a project's overall design (e.g., currently, a project cannot count stormwater detention areas as open space). Projects should research city policies and regulations to determine how these may influence and impact their design, and city agencies should be engaged in troubleshooting the limitations that may exist.

*Next Step: Commission a report to identify and evaluate the City of Denver policies and codes that limit regional stormwater solutions.*



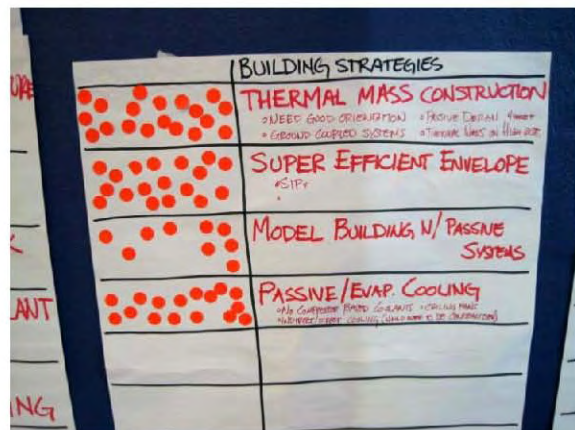
## 4. Lessons Learned: The Charrette Process

DHA is committed to making the South Lincoln Redevelopment Project a successful example of resident and community engagement. DHA, with the support of EPA, decided to engage local, state and federal government agencies, the La Alma / Lincoln Park (LALP) community, non-profit organizations, and private entities in three 8-hour highly interactive multi-day meetings, also called charrettes. Each charrette was structured to generate innovative design ideas, identify barriers to and strategies for implementation, and build partnerships with stakeholders. Below are general lessons learned from the charrette process.

- **Project goals determined early in the planning process can help frame discussion and approach:** Determine the goals of the charrette early on in the planning process. Charrettes can focus on gathering design feedback and input, engaging stakeholders, problem solving issues around implementation, or a combination of all of these approaches. It is also important to decide whether participants should engage in technical discussions, “blue sky” brainstorming, tactical or logistical implementation, financing, etc.
- **Identify key players, and provide opportunity for active engagement and participation:** Once the goals and objectives of the charrette have been determined, it is very important to identify the key stakeholders/participants, determine the date of the charrette, and confirm the attendance of these key stakeholders. It is also helpful to have these key players engaged early and often throughout the planning process. Once at the charrette, allow time for the invitees to engage in small group discussions and activities, then report out to the larger group and participate in Q&A. It is also helpful to keep the presentations brief and focused and rely on the group’s participation to fuel the discussions and charrette progress. Key stakeholders will likely include city planning, public works, the mayor’s office, the local utility, transportation authority, academia, technical experts, residents, and neighboring organizations or businesses.
- **Resident participation is critical:** Ultimately, the outcomes from the charrette process are intended to improve the lives of the residents who will live in the future development. Active resident participation in the charrettes will help to ensure that the discussions and efforts during the charrettes address actual resident needs.
- **Balance the technical depth of the charrette with the participants’ skills and project goals:** Presenting technical information when the audience is both technical and non-technical can be challenging, but may be necessary. Breakout groups can be used to divide the group into different skill sets, where some may focus on technical or design issues, and others may address policy or implementation.
- **Charrette leaders and facilitators can be most effective if they are well prepared:** Charrette leaders should be familiar with local issues and back story, current politics, stakeholder perspectives and positions, etc. in order to guide fruitful and meaningful discussions. Knowing the ins and outs of the subject matter allows for preparedness and opportunity to pose the right questions.
- **Use results from technical analysis to focus the discussions:** Identifying and completing pre-charrette analysis can help clarify objectives and opportunities for the project and charrette, as well as advance progress and discussions during the charrette. This analysis should anticipate the major questions participants are likely to have about the technical aspects of the project. Projects that move forward without the necessary analysis will likely be relegated to a conversation of speculation and first principles. Through the charrettes for SoLi, more complete designs and analysis around energy efficiency and renewable energy, transportation options, and stormwater and green infrastructure have been explored. Specifically, SoLi has had significant energy modeling completed at the building and district level, and preliminary stormwater analysis completed for the charrette has initiated follow-up discussions involving key regional stormwater planning participants and agencies.







## 4.1 Tips and Guidelines for a Successful Charrette

Planning a successful and productive charrette requires consideration of the project team's goals and identifying the type of charrette that would be most effective for achieving these goals, as well as identifying the appropriate people to have in the room. Being adequately prepared for the charrette involves securing a suitable space for the event, performing background research, and developing presentation materials and handouts for the attendees. These initial considerations, and preparation tips and guidelines for ensuring an effective charrette are outlined below.

### Initial Considerations:

- **Identify the Type of Charrette:** The type of charrette influences the goals of the day and its outcomes, the agenda, breakout group activities, and who will be attending the charrette. The type of charrette is primarily determined by the goals of the project, as well as the project phase and schedule. Charrette types can be defined as the following:
  - **Design (technical / non-technical):** Focuses on brainstorming strategies and fleshing out possible design solutions that will meet the goals of the project
  - **Implementation:** Focuses on identifying barriers and feasibility, and developing next steps and action plans for implementing the identified strategies
  - **Stakeholder Engagement:** Focuses on engaging the community and key stakeholders that can support the development of the project goals and identified strategies

- **Define the Charrette Goal:** The charrette goal can greatly influence and shape the type of charrette, the day's agenda, break-out group activities, and overall outcomes and next steps. When defining the charrette goal, keep it clear, concise and quantifiable.

Sample goals include:

"Identify priority strategies for creating safe and accessible walking, biking, driving, and public transportation options for ABC project residents and develop an implementation plan to overcome the anticipated barriers to each of those strategies."

"To explore the goal of a net-zero historic building through an interactive dialogue; to develop a process map template for the ABC project, and existing building retrofits at-large; to define a "resource kit" of strategies and tactics, integrated with the process map, that could be deployed on the ABC project and similar projects."

"To identify strategies and action items required to design ABC building as 35% better than ASHRAE 90.1-2007."

- **Identify the Invitee List:** When identifying which stakeholders and community members should be involved in the charrette, consider the following:
  - Project team members
  - Operations Staff
  - Local sustainability leaders
  - Community stakeholders
  - Federal, state, regional, and city staff
  - Technical experts
  - Affordable housing stakeholders
  - Neighboring property owners / residents / organizations / non-profits
  - Local businesses

## Preparing for the Charrette:

- **Develop and Prepare Charrette Materials:** Being properly prepared and prepped with a set agenda, presentation, handouts, and breakout group activities can make the day run smoothly and allow the participants to contribute in a way that is effective to meeting the overall charrette goal.
- **Perform Research and Analysis Prior to Charrette (as applicable):** Completing analysis before the charrette can greatly guide questions and discussion for the group. Presenting this analysis, not as conclusions, but as useful background information, can focus discussions and engage the participants about the possibilities of specific strategies. Furthermore, completing analysis required before the charrette can help outline objectives and opportunities, and advance the progress and discussions during the charrette.
- **Confirm and Communicate Charrette Logistics:** Providing attendees with information to adequately prepare them for the charrette is key to the day running smoothly and for ensuring participants arrive prepared and are engaged in the discussions and activities.

## Creating the Space

- **Determine the Ideal Location:** An optimal space for hosting charrettes will have a quiet room for collaboration, opportunity for presentations, and the flexibility to move tables and chairs into various configurations. Additionally, wall space for posting flip chart pages and internet access for some presentations can be helpful.
- **Plan the Charrette Set-up and Required Materials:** A variety of materials are required for the various „stations“ and participants at a charrette. The lists below outline the items that can be included at the registration table and at each breakout group table, as well as a comprehensive list of materials that can be considered part of a charrette “tool box”. These items can help make sure presenters and facilitators have the resources and materials they need to run the charrette smoothly, and participants can communicate and document their ideas effectively.

### At Registration Table:

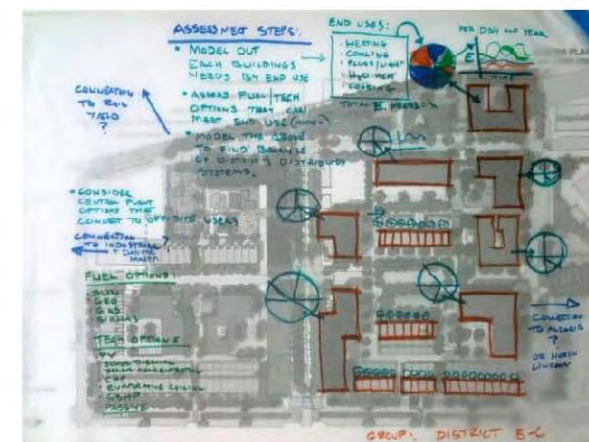
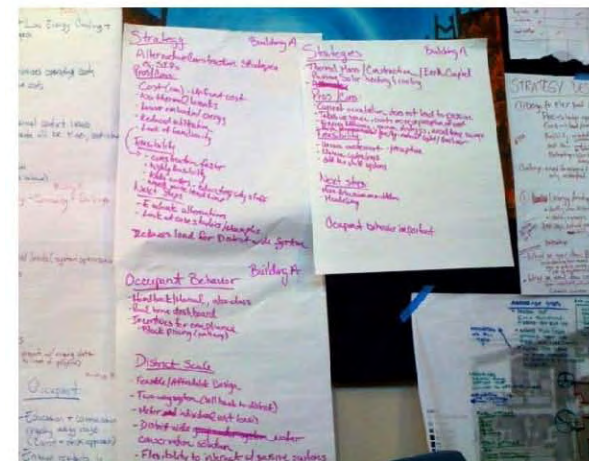
- Sign in sheet
- Name tags (printed out or blank)
- 2-3 markers (if name tags are blank)
- Pens
- Printed agendas
- Handouts (as applicable)

### At Tables (ideally for 6-8 people):

- Breakout group guides (reference guides, books, resources, etc.)
- Flip charts
- Breakout group titles (as applicable)
- 6-8 color markers, 2 regular pens
- Note pads and post-its

### In Charrette Tool Box:

- 6-8 color pens for each table
- Small note pads for general note taking (2 per table)
- Small post-it notes for charrette feedback and exercises
- 50 per table colored dots (for voting in exercises)
- 3 rolls of painter's tape, 3 rolls scotch tape, 1 roll double sided tape
- Scissors (1 per table)
- Tracing paper roll (12 in. for small drawings and 24 in. for large)
- Architectural scales and/or engineering scales (1 per table)
- Flip charts (with sticky back) (1 per table, 2 for overall group)







### Facilitating Breakout Groups:

- **Provide Guidance and Allow for Open Discussion:** Breakout groups provide an opportunity for participants to share ideas, expertise and perspectives in smaller groups as they tackle the charrette goal and key objectives. In this way, this time is an opportunity for all participants and stakeholders (as opposed to a few dominant voices) to get involved and actively engage in the session.
- **Allow Ample Time for Report Out:** Breakout groups are helpful for getting everyone to participate and share their ideas and input. It is important to provide enough time for each breakout group to report back to the larger group to fully capture and process those ideas and feedback. This can take a lot of time and should be led by the charrette facilitator.
- **Have Trained Facilitators:** Facilitating large charrettes and breakout group discussions can be a challenging task, especially when the discussions encourage various stakeholders to think and work outside of their traditional roles. Trained facilitators can help charrette attendees discuss difficult issues, address dominant personalities, and clarify complex issues so everyone can actively participate in the charrette.

### Closing the Charrette:

**Identify Common Themes and Next Steps:** The final wrap up for the charrette does not have to answer all the questions that have been raised over the course of the charrette, but should identify common themes and conclusions related to the charrette goal, and explicitly relay the next steps for the project team and participants.

### Follow up Items (as applicable):

**Keep the Conversations Going:** Although the charrette is over, the relationships made and the discussions generated certainly extend beyond the charrette.

### Additional Tips and Guidance:

- **Stock Questions to Promote Discussion:**
  - How can the identified strategies be prioritized?
  - What barriers may there be to strategy implementation?
  - Who else do we need involved to succeed in implementing the strategies?
  - How do the strategies map to a timeline of the project schedule?
- **Rules for Engagement:**
  - Multi-Task Free Zone
  - Be open minded; contribute across disciplines; don't focus on what can't be done
  - Have fun
- **General Guidance:**
  - Don't start too early
  - Two ½ days is better for an 8 hour charrette (afternoon / morning)
  - Plan for a happy hour or other social gathering
  - Use scheduling tools for coordinating optimal meeting times
  - Have an assistant or support for the facilitator that can help with logistics, set-up, welcoming attendees, taking notes, etc.
  - Food, snacks, and coffee will help keep charrette participants engaged



## 5. Conclusions

The South Lincoln Redevelopment Project Pilot Charrettes have been a powerful and rewarding opportunity for the Partnership agencies, state and local stakeholders, and the La Alma / Lincoln Park community to come together and participate in sustainable community development, integrated design and collaboration. Through this process and these efforts, the SoLi project has been an effective “testing ground” for the Partnership agencies as they continue to define their shared roles in the design, construction, and operation of sustainable communities.

The use of large community charrettes to gather innovative design ideas, promote communication and build support among stakeholders, identify technical solutions and barriers, and develop a plan for implementation has been an effective use of time and resources. The benefit of these charrettes is that they help to build new relationships that are critical for the successful implementation and coordination of sustainable community development projects. This kind of relationship building is something that rarely happens through technical analysis and long paper reports. Community charrettes are an important way to build and maintain momentum around innovative and forward thinking ideas, technologies, programs, and initiatives.

The charrettes, technical analysis, and lessons learned through this Pilot program have helped to test and define a more engaging and effective process for the Partnership moving forward. This process creates a forum where the Partnership agencies can directly engage and support local and regional stakeholders who are asking challenging forward thinking questions on new community development projects. Ultimately, any process and project adopted by the Partnership agencies is dependent on the commitment, available resources, and expertise of the individuals on the project team. Through community charrettes, team members can more effectively develop shared project goals, identify key partnerships and barriers, and outline a meaningful and realistic implementation plan.



