

How to Organize a Community Design Workshop

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This article is excerpted from "Environmental Design Charrette Workbook", a 130-page primer on organizing and facilitating community design workshops. A copy of the full publication can be ordered from Donald Watson, EarthRise Initiatives, 54 Larkspur Drive, Trumbull, CT 06611.

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Introduction

Typically, a community design workshop is a two- to three-day meeting process in which community representatives, public officials, experts and consultants and citizens work together to envision alternatives for a local building program, neighborhood or regional community project, with an emphasis upon long-term economic, social and environmental sustainability.

A range of topics may be considered and represented through focus discussion and the involvement of experts, such as:

- **Energy and Resource Conservation:** Ways to reduce energy and resource use and resulting pollution and to use renewable energy sources through optimized building design, materials selection, envelope and windows, lighting and daylighting, utility loads, heating, cooling and ventilation systems.
- **Environmental Approaches to Landscaping:** Ways to improve air, water and landscaping quality through site design, with the goals of cleansing water streams and aquifer recharge and reducing the negative environmental impacts of parking, paving and walking surfaces.
- **Waste Prevention and Reclamation:** Ways to reduce and eliminate waste and establish environmentally sound practices of construction and demolition waste reduction, reuse and recycling, as well as practices of water and waste-nutrient recovery.
- **Cultural Change and Behavioral Issues:** Ways to introduce policies and practices that encourage environmental equity and justice and community involvement.
- **Regional Scale Planning:** Ways to promote environmental approaches to land use, transportation patterns, and bioregional planning including restoration of habitat, vegetation and water/aquifer systems.

Guidelines for Design Workshop Organizers

A full design workshop is typically a two- to three-day event, for examples, starting with a kick-off dinner and inspirational goal setting (Friday evening), continuing all day Saturday and ending with a "public presentation" of results mid- to late on the third day (e.g., Sunday afternoon). In some cases, this can be shortened to two days. A typical size of group is between thirty and sixty people, although many design workshops have involved several hundred and more.

The Design Workshop in the Context of Community Dialogue

In the best cases, the design workshop is linked to a larger initiative, before and after the event, that builds local community initiative and development. The following guidelines indicate characteristics that are recommended for successful community development that builds upon the workshop process:

1. **Listen and Learn:** The workshop process provides for listening and understanding. It works if it facilitates mutual learning and capacity building amongst community groups, rather than perpetuating dependency upon outside "experts" and resources.
2. **Combine and Focus:** Create focus by combining projects and programs within "high impact" areas strategically selected for demonstrable and replicable results.
3. **Create Community Participation:** Emphasize participatory decision-making that enables collaborative partnerships and encourages local initiative, volunteerism and community-based leadership.
4. **Build Upon Local Networking:** Link local initiatives (bottom-up) to broad (horizontally-linked) networks, such as citywide collaborations.
5. **Create Multi-Disciplinary Linkages:** Link community- and university-based professionals from a range of disciplines to represent economic, social and community planning experience and knowledge.
6. **Emphasize Sustainable Development:** emphasize the need to integrate economic, social and environmentally sustainable approaches to planning, programs and projects.
7. **Invite Scrutiny and Evaluation:** Experiment with and document different approaches, to report and disseminate lessons learned about action-based community development, establishing the basis for continuous professional and community learning.
8. **Create Youth Initiatives:** Include young men and women in workshop organization roles, providing real-life opportunities for youth leadership.

Generally, a minimum of three months (most typically six-months) is needed to prepare for a successful event, with a longer timeframe required for more complex events. The months prior to the design workshop involve a series of key actions:

1. **Identify a Significant Project**

It is important to choose a topic that will engage both positive and substantive community support. The initial proposal need not be perfect. It should be open to modification as discussions and planning proceeds. It has to be a project that is inspiring and at the same time feasible, that is, it does not raise false hopes.

Work at defining an issue or program focus that is meaningful, such as a local neighborhood area that deserves community discussion of alternatives and improvement. The size of project can range from building-scale to one well beyond the neighborhood scale.

Start with an initial proposal but let it develop with input from local constituents and stakeholders. Out of a number of preliminary discussions, key issues will emerge. Keep these and the goals of discussion relatively focused, while not ignoring larger and more complex implications.

2. Involve Co-Sponsors Who are Stakeholders in the Results

There are two guidelines to involving stakeholders: The first guideline is, "Get stakeholders involved early on." Approach key stakeholders in a low-key way and in their terms, letting them know who you are and what you are about. Make their concerns yours.

A second guideline is "Don't leave anyone out." If the workshop project involves different groups or communities normally left out of the planning and decision process, organizers may find themselves from the outset dealing with a potentially disruptive situation.

3. Establish Pre-Event Meetings that Keep Planning Going Forward

The overall questions in organizing a design workshop are WHO, WHAT, WHEN, WHERE, WHY and HOW. Of all of these, the HOW is usually the most difficult question at the beginning. That is, there is a perceived need but the way to get there is not clear. In such cases, a broad-based and representative discussion and input from stakeholders is most helpful. A series of small-scale organizing meetings may be the best approach. Once established as regular meetings, they become "heartbeats" to the organizing process.

Communicating a clear goal is essential. Once the overall intent and purpose of the design workshop is agreed to, it is useful to state the goals or desired outcomes, keeping in mind that these too will evolve. Stating the goals as a desirable future vision makes it easier to capture the enthusiasm and support of participants.

Timing the event is important. Like any significant planning proposal, there is a right time and a wrong time.

With a statement of intent and the program defined, organizers are then ready to move onto second level decisions of implementing and preparing for the event, most typically through task group assignments that follow normal definitions:

- **Program:** program definition and support materials
- **Funding:** funding and/or contributions in kind
- **Communications:** getting the word out and the press in
- **Logistics:** particulars of space and support materials

4. Define the Program

There are at least two different ways to provide the basic organization of groups participating in the event. The one to choose or the right combination depends upon the task at hand.

The first is to organize into generalized and integrated design teams, typically five to six people on each team who work together to develop a design, while "experts" roam between teams consulting with each team throughout the workshop. This option is

appropriate where the predominant project goal is to come up with new design and planning visions.

An alternate is to organize specialized expert teams, in which case the number per team can be typically six or more, who work together to develop a set of recommendations related to a particular specialized topic, that is, lighting, building envelope, landscape, etc. This approach works well where there is an existing building or set of conditions that are pre-existing and otherwise already designed that require a specialized set of environmental recommendations.

An obvious variation is to use both integrated design teams and specialized consulting groups, although limited time and the "getting used to" any particular organization cautions against anything overly complex. Each design project will suggest the nature of team composition, "division of labor" and integration of expertise.

It is important to include diverse groups in organizing the workshop and in the event itself. Remember the facilitator's rule that the best ideas come from the least expected source.

Kick-Off Event

The introductory meeting provides a crucial "kick-off." In many cases this began with a dinner followed by presentations intended to inspire, to inform and to set the stage for community creativity. The kick-off is an event to which one can invite local officials and others who would like to be briefed – some may be intrigued enough to change their schedules and stay on for the rest of the event. The kick-off or opening session is also typically used to provide the technical briefing to set the teams in place, get logistics out of the way and prepare groups for action.

In cases where the site is large, complex and not completely familiar to all participants, a tour of the site is appropriate and more immediate and informative than a slide show briefing.

Schedule

While the design workshop event is relatively short, the overall process is extended in both directions that are from four- to six-months in preparation and an equal or longer time in implementation. But the event itself needs to be scheduled within its allocated time, to capture the interest and focused energy of the participants.

Preparing and rehearsing for the final "public" presentation keeps to focus the workshop effort. There's nothing like a deadline for "Show Time!" In most cases, a spirit of cooperation and participation develops, much like getting ready for a theatrical production. Ideally, everyone would feel that they could be part of the presentation, although not all can be "on stage," but it is important to present the work in the most representative manner possible. It is a perfect time for the "stakeholders" and/or implementers such as community leaders, youth and student participants to present the

results, instead of the outside "experts." At least one dry run of the final presentation is recommended to make sure that timing and transitions are worked out.

5. **Putting a Funding Strategy in Place**

A likely source of funding support related to community design goals are local utilities as well as municipal planning authorities. Both sources represent a vested interest in energy conservation, pollution prevention and waste elimination. Local and regional community and environmental agencies and associations are additional likely sources of endorsement and support funding.

6. **Establish a News and Communication Plan**

In most cases, the local press is easily involved in public communication and coverage, provided that notice is given (ideally, an informative and interesting press release) so that media reporters know about significant meetings and the event itself. Both the kick-off and the final public presentation of the work can be organized to provide media coverage. Local newspapers are often a readily available means by which to publish the results, such as in a special "Sunday Supplement" printed as a community service. To assist in all of the media coverage, high quality reproducible graphics provide helpful visuals for articles

1. **Logistics**

Where to Hold the Design Workshop Event

There are several recommendations about the workshop location itself. One recommendation is to hold the event at or near the actual project site, or at least to provide easy access so that site conditions can be visited, seen and discussed. An alternative recommendation is to hold the design workshop in a publicly visible and accessible location.

The entire event should be held in one room, such as a gymnasium, in which many groups of five to six people can work. Each group should have access to flip charts and ample wall space. The workshop space should have at least one long wall that can be used to tape up flip-chart sheets and the maps and drawings that are produced during the event. Recording the ongoing discussions on flip charts is important, so that information can be inspected and in turn responded to by others. Flip-chart sheets, numbered appropriately, also become an important record of the event discussions that might otherwise be lost.

Standard folding rectangular tables can be placed throughout the space, but easily movable by any of the groups. It is not necessary to be too formal. In fact, is essential to avoid an imposing centrally organized space, such as a stage or podium. All that is required is a large space in which many discussion groups can occur. While part of the discussions will be "in plenary" with the entire group listening to one another, at least half the time and typically more is in small break-out groups. The number that makes up the "optimum size" of a small break-out group is debatable, but highly interactive groups,

ones where all can have an active say, should be limited to five to six people per group. There is a great deal of learning by conversation, sharing of ideas and mutual discovery. In large meetings, microphones placed informally around the room allow for plenary discussion to occur without a centralized podium layout.

Materials and Resources

Workshop materials and supplies should include ample quantities of flip charts and pads of paper, removable masking tape (not drafting tape), water-based markers (avoid bringing any permanent markers into the meeting in order to protect wall and table surfaces) and paper! Organizers can shop around for best paper supplies. Normally, rolls of paper can be purchased in bulk. Architect and engineering offices are a source of blueprint paper to be re-used.

Other presentation tools that may be needed include overhead projectors, which allows both group and plenary presentations to be much simpler and easier to project and record. Convenient access to an 11x17-inch copier is helpful for presentations. In some instances, availability of a one-hour photo processing shop may also be helpful, for example, for slides of views of the site for projection and enlargement to create overlay perspective drawings of design proposals.

Other materials to have on hand include:

- Tags for names of participants
- Reusable coffee mugs (or ask participants to bring their own)
- Tape dots (the facilitator's computer)
- Yellow post-its 3x5 or larger (the facilitator's advanced computer)
- Slide film (EKTA-CHROME for one-hour processing) to document site conditions and the ongoing events)

It is useful to provide within the room a "community wall" and resource area for key information and exhibits. This normally includes the maps and resource information displays that are part of understanding the project context, such as overhead photos and maps from the local planning office. In addition to a resource board, some sort of interactive communication board is often helpful, especially in large groups.

Yum!

Food brings folks to the table. Provide good high-energy food. Community workshops need to demonstrate and practice what they preach that is, well being and well living, so that food should be served that is healthy and not wasted (have a local community organization take any extras).

There are advantages to bringing in food. It cuts down or reduces travel time, disruption of the workshop process and helps to encourage "working lunches." An alternative to delivered meals is to utilize nearby restaurants, providing a time and place for breaks that need not unduly interrupt the flow of work.

Evaluating the Event

Most workshop events go quickly with a great degree of intensity and focus, so that when it is over, people leave quickly to catch up with things left undone for several days.

However, without some evaluation process, valuable lessons learned may go unheeded. It is therefore recommended that some form of event evaluation be put in place, allowing time in the concluding session for evaluation forms to be completed before participants leave. This evaluation, whether in questionnaire form or otherwise, should allow for commentary to capture creative insights and suggestions for improvement.

If an evaluation questionnaire is simple and easily understood, participants will fill it out. It can be as simple as:

- What worked?
- What didn't work?
- Suggestions for improvements?
- Suggestions on next steps?
- Other thoughts?

Ask people to fill out their responses in clearly written form, explaining that what they say is important. Such responses will often yield an overall evaluation, along with very valuable insights and ideas for improvements and next steps. It is important to tabulate and publish the results. "Inviting scrutiny" can inform the entire process. In addition, an "evaluator or reporter" who is asked to summarize and evaluate results might monitor the event.