



December 11, 2012

Torpedo Factory Art Center
Alexandria, Virginia

IQ Charrette Planning Topics

I. General

A. Goals of the IQ Charrette

1. The Charrette is the centerpiece of the overall IQ process and is a key event in formation of the overall vision for project.
2. The Charrette is an opportunity to build enthusiasm and support for the project well beyond traditional planning efforts, via the excitement created among the participants.
3. The Charrette is the primary point of the communication of information. Day One typically includes a gamut of expert speakers, which serve to frame the background for the envisioning work of Day Two.

II. Participants List

A. Participant Selection Criteria

1. The Charrette is an intense, active, exciting and fun event.
2. All participants should be selected for their ability to contribute to the discourse.
3. Participants will be completely accommodated, including meals, lodging (if necessary), logistics, and any personal needs we can help with, such as travel (if necessary), etc.
4. In turn, the Charrette requires a complete commitment from the participants in terms of their time during the entire Charrette, along with their physical and mental energy, their ideas, thoughts, and wonderings.
5. Partial participation should be discouraged unless it is completely unavoidable and the participant is a key member of the group, or if a participant is specifically planned as a partial participant for a distinct purpose.
6. Attendance should be planned based on room size, constituency size, budget and other factors. We have found that groups of ranging from 18-35 work best. Tables of six to seven maximum work best (functioning as teams). Thus, the total group size as a multiple of table size works best, with a maximum of five tables of seven attendees.

B. Suggested Participant Categories & Estimated Numbers

- | | |
|---|-------------|
| 1. Student Participants (this is suggested only, need to discuss) | 0-3 (?) |
| 2. Artists | 3-5 persons |
| 3. Board Members | 2-5 |
| 4. Staff Representatives | 1-2 |
| 5. Valued Consultants or Advisors | 1-2 |
| 6. Community Leaders (Bankers, Mayor, Publisher of the Local Paper, etc.) | 3-5 |
| 7. Affiliated Engineers or other Technical Consultants | 1-2 |
| 8. Expert Outside Speakers (i.e. those not from one of the groups above) | 3-4 |

9. Friends-at-large (tbd)	1-2
10. Artist representatives from other arts centers (tbd)	2-3
11. Owners or Managers from Competitive Set or Other Properties	<u>1-2</u>
Total Possible participants	18-35
{Preferred Maximum Participants (3 tables of 8 each)	24}
{Probable Maximum Participants (5 tables of 7 each)	35}

C. Participant List & Contact

1. 3north will provide list management and formal communication.
2. Participant logistics (travel, overnight lodging, travel assistance, honoraria, if any, etc.) will best be handled by the Owner's travel assistant(s).

III. Speakers

A. Speakers Selection Criteria

1. We anticipate several presentations by various speakers. Each such presentation is typically made by a single speaker, although, certain presentations can also be coordinated as a panel or group discussion.
2. Speakers are generally experts in their field or have a special relationship with the project.
3. Speakers are always participants, unless extenuating circumstances prevents their full participation. Speakers are especially important participants because of their contributions, not only relative to their presentation, but also in their involvement in the group activities.
4. Speakers who are standing employees, consultants, friends or community leaders may be asked to speak and attend; however, such relationships need to be evaluated for their overall value and the speaker's ability to bring objectivity, perspective, and wide knowledge to the activities of the Charrette.
5. Speakers are more often outside consultants, who lend their valuable expertise at no additional cost to the project. However, some such speakers sometimes require a per diem, or honorarium, or other stipend to attend. They may, or may not have an ongoing consulting relationship to the project.

B. Discussion Categories & Prospective Speakers (five slots currently planned from the potential list below):

1. Facilitator: David Rau. Typically, a 3north principal will lead the entire proceedings. David will also present various IQ related mini-presentations throughout the Charrette.
2. Planning Intent & Schedule Framework. Presenter: Board of Directors Leader, or other senior leader, acting as host or manager. A brief overview of the larger planning process and how the Charrette fits in.
3. A History of the facility relative to the project at hand. Presenter: 3north Historian. A concise talk, with visuals, to focus the group on the overall sweep of history of the Torpedo Factory, including its original use.
4. History of Art Center. Presenter (tbd): Torpedo Factory Founder or other qualified insider. A companion talk to the one above, also with visuals, centering on the design, development and construction of the facility, its operation, social history, and significant changes over time.

5. Local Craft, Art and Culture. Presenter (tbd): Local Arts Leader. Presentation by a potential expert speaker on the subject of current trends in handi-craft, furniture, media, style, artwork or other applicable subjects (tbd). Past, present and future should be reviewed with an emphasis on cutting edge multi-media and digital interaction.
6. Retail. Presenter: Arts retail consultant. This would be an outside expert presentation, ideally by a leader in the arts retail area or museum retail.
7. Food Service & Group Sales. Presenter: Event Planner. This talk will address integration of contemporary food services and event spaces within institutional setting. The emphasis would be on the demographics of the market, characteristics of successful venues, what trends drive business (Fresh, local food, "Slow Food," for instance, or flexible and accessible space), and how to successfully compete.
5. Sustainability & the "Green Arts." Presenter: Sustainability or Ecology Leader (?). This discussion would include ideas on eco-tourism, arts and the environment, design and construction concepts (LEED), as well as marketing and promotional approaches that green design can lend.
6. Marketing and Development within the Arts. Presenter: Marketing or Development Expert (?). This talk will address PR of facilities like the Torpedo factory, and show how to successfully position it within the marketplace in a way that claims a leadership role.
7. Case Study Discussion. An Owner or General Manager of Competitor(?)

III. Meals

A. Objective at Charrette Meals

1. Charrette meals are critical opportunities for all participants to share an experience, create a collegial bond, and exchange or test ideas.
2. Charrette meals are often a chance to showcase a project venue, whether it is currently a well-developed asset or if it is a potential asset.
3. Charrette meals offer a unique opportunity for the group to visit comparable or contrasting venues, even competitors, to help envision better events at the subject property.
4. Charrette meals, especially when taken off-site, allow a much-needed break in the intensity of the on-site activities, so that participants can return to the proceedings refreshed and invigorated.
5. Charrette meals, especially those off-site, or otherwise made special with unique presentations or musical entertainment, offer the host institution a way of expressing their thanks and gratitude for the participants' commitment of time and energy.

B. Charrette Meal Planning

1. Arrival Evening (night before Charrette): Participants who travel from out-of-town will be responsible for dinner on their own. Some special direction can be provided in the briefing document to advise guests on places to dine nearby.
2. Day One, Morning Session: Buffet Breakfast on site. This may be a specially set buffet in room near by the main meeting room.
3. Day One: Morning Break. To be available in a pre-function space near by the main meeting room so that participants do not need to go far and an efficient break can be had. A simple coffee break with very light food, if any, is all that is required.
4. Day One: Lunch. This is the first formally arranged meal, which can be taken within the meeting room or in another space nearby in order to be quick and efficient.

5. Day One: Afternoon Break. Again, this needs to be available in a pre-function space near by the main meeting and with just a simple but interesting snack.
6. Day One: Evening Reception. Typically, this is handled with the dinner (described below) and usually includes cocktails. Cocktails may occur in one location and the group could then move to the dinner setting. There is often an exercise activity during drinks.
7. Day One: Dinner. Typically, this meal is the centerpiece of the entire Charrette and is an integral element in achieving the overall goals of the project. Quite often, we depart the location of our daily meeting and take some sort of transport to a special location. This can be an art museum, a gallery, an inn, a corporate space, a unique restaurant, or even a rustic setting like a dramatic barn or tent. We can use the home of a participant or friend of the University, if they are willing.
8. Day Two: Buffet Breakfast on site.
9. Day Two: Morning Break. Repeat of Day One Morning Break with a simple variation.
10. Day Two: Working Lunch. Typically at this point the participants have broken into teams and are hard at work with seminar projects and presentations. To facilitate this, a buffet-style working lunch is served in an adjoining room that people may bring back to their tables in the main meeting room. This is essential for a prompt adjournment at the end of the day.
11. Day Two: Afternoon Break: Again, a repeat of Day One Afternoon Break with a simple regional variation.

IV. Typical Agenda

First Session Day (Arrivals the night before)

9:30	Welcome	Typically by Facilitator
9:40	Introductions	Round robin format led by Facilitator
9:50	Planning intent & schedule framework	See above
10:00	The meaning and importance of IQ	David Rau
10:30	Vision Statement	See above
10:45	Morning Break	
11:00	Expert Speaker A	Typically History of the Property
11:45	Tour Briefing	Typically by the Operator
12:30	Facility Tour	
1:00	Reassemble & Assign Activity No. 1	Lunchtime assignment given by Facilitator
1:15	Lunch	

Afternoon Session

2:00	Report on Activity No. 1	Led by Facilitator
2:15	Expert Speaker B	TBD
3:00	Expert Speaker C	TBD
3:45	Afternoon Break	
4:00	Expert Speaker D	TBD
4:45	Expert Speaker E	TBD
5:30	Wrap up & Assign Activity No. 2	Overnight assignment given by Facilitator
7:00	Evening Cocktails & Activity No. 3	See above. Traditional entertainment is desirable, possibly artists, or art students.
7:30	Dinner	May be an off-site location that is inspirational, but not in competition with, the host facility.
9:30	Adjourn to private quarters	Participants go home or to lodgings.

Second Session Day

Morning Session

8:30 AM	Group Assembly & Buffet Breakfast	
8:45	Report on Activity No. 2	Led by Facilitator (completed the evening before)
9:15	Formation of Teams	Led by Facilitator
9:30	Assign Activity No. 4	Given by Facilitator
9:45	Report on Activity No. 4	Led by Team Leaders
10:00	Morning Break	
10:15	Assign Activity No. 5	Given by Facilitator
10:45	Report on Activity No. 5	Led by Team Leaders
11:00	Assign Activity No. 6	Given by Facilitator
11:45	Report on Activity No. 6	Led by Team Leaders
12:00	Group Working Lunch & Report on Activity No. 3	Led by Facilitator (assigned the evening before)

Afternoon Session

12:45	Re-formatting of Teams	Led by Facilitator
1:00	Discussion on Themes	Typically by Facilitator
1:30	Assign Activity No. 6	Given by Facilitator
2:00	Report on Activity No. 6	Led by Team Leaders
2:15	Afternoon Break	
2:30	Assign Activity No. 7	Given by Facilitator
3:00	Report on Activity No. 7	Led by Team Leaders
3:15	Assign Activity No.8	Given by Facilitator
3:30	Report on Activity No.8	Led by Team Leaders
3:45	Summary	Typically by Facilitator
4:00	Adjournment & Departure	Usually in time for evening flights home.