SUSTAINABLE DESIGN ASSESSMENT TEAM

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A Guide to the American Institute of Architects SDAT Program

Contents

The American Institute of Architects Sustainable Design Assessment Program

What is a Design Assistance Team (DAT)?

Since 1967, the American Institute of Architects (AIA) has run Design Assistance Team (DAT) programs. These are results-driven community design programs based on the principles of interdisciplinary solutions, objectivity, and public participation. The programs combine local resources with the expertise of a multidisciplinary team of nationally recognized professionals who volunteer their time to identify ways to encourage desirable change in a community.

The team visits a community for three to four intense, productive days. The process is fast-paced, exciting, and energizing. This approach—which can address social, economic, political, and physical issues—offers communities a tool that mobilizes local support and fosters new levels of cooperation. The DAT programs have used this grassroots approach across the nation to help create communities that are healthy, safe and livable, as well as more sustainable.

In 1967, AIA launched the Regional/Urban Design Assistance Team (R/UDAT) to focus on community design problems. In 2005, AIA expanded its efforts with the Sustainable Design Assessment Team (SDAT) to focus on community efforts to increase sustainability. The DAT programs are offered to communities as a public service of the AIA. More than 500 professionals representing more than 30 disciplines have donated over $3.5 million in services as members of DAT teams.

SDAT PROGRAM PRINCIPLES

The SDAT program relies on three simple tenets: multidisciplinary expertise, objectivity, and public participation. Combined, these three tenets provide communities with

- **Customized Design Assistance.** Each SDAT is designed as a customized approach to community assistance which incorporates local realities and the unique challenges and assets of each community.
- **Objective Technical Expertise.** The SDAT Team is assembled to include a range of technical experts (planners, architects, economists and others) from across the country. Team members do not accept payment for services in an SDAT. They participate in a volunteer capacity on behalf of the AIA and the partner community. Additionally, team members are required to refrain from accepting business in a partner community for at least one year following the SDAT project. As a result, the SDAT Team has enhanced credibility with local stakeholders and can provide unencumbered technical advice.
- **Inclusive and Participatory Processes.** 40 years of experience in community design assistance has shown that public participation is the foundation of good community design. The SDAT involves a wide range of stakeholder viewpoints and utilizes short feedback loops, resulting in sustainable decision-making that has broad public support and ownership.
- **Results.** The SDAT combines multidisciplinary expertise with highly interactive, participatory public involvement processes to condense normal planning tasks (which typically take months) into a three-day period. The intense process and compressed schedule allows a community to capitalize on SDAT information quickly and build momentum for implementation of its plan. The SDAT includes the delivery of a formal report and recommendations as well as a follow up assessment.

WHAT IS THE STRUCTURE OF THE SDAT PROCESS?

The DAT process is flexible, but typically has four parts or phases, some of which may overlap:

Phase 1: Getting Started and Applying

The SDAT program issues a formal Request for Proposals once a year. A local leader or citizen calls the AIA and asks for help and information, initiating a conversation between the AIA and local leaders. AIA staff will work with the community from project conceptualization to a formal application for AIA assistance. The community forms a steering committee that represents a cross-section of residents, local government agencies, businesses, institutions, and community groups. This committee gathers community support and prepares an application. Upon review and approval of the application, the AIA makes a formal commitment to your community.

Phase 2: Preliminary Visit

An AIA staff person and the DAT team leader selected by the AIA conduct a 1-1.5 day long preliminary visit to the recipient community to tour the project area and surrounding community and to meet with the steering committee. This visit introduces the leader to the community and its concerns and sparks broader community interest and participation in the process. The preliminary visit is relatively informal and does not require extensive meetings with all of the interested stakeholders; the primary goal of the preliminary visit is to establish the topical areas of focus for the project. At the conclusion of the preliminary visit, preparations begin for the full team visit, including logistical plans (meeting locations, team work space, plans for publicizing the event, etc.) as well as team member compilation by the team leader and AIA National staff.

Phase 3: Full Team Visit

The team leader and AIA National Staff select a multidisciplinary team of five to seven professionals who visit the community for three (SDAT) intense, productive days. After viewing both the study area and the surrounding community and listening to the concerns and ideas of residents, interested groups, and community leaders, the team prepares a summary presentation of its findings that is presented in a public meeting on the last day. A final report is created and provided to the community. This report is typically provided approximately two to four months after the team visit (SDATs), and is provided to the community in electronic form as well as posted to the AIA website.

Phase 4: Implementation

The community begins implementation by analyzing the team recommendations, identifying priorities, preparing an action plan, and undertaking immediate objectives. SDAT team members are available to answer questions or offer advice throughout the implementation phase, and provide follow-up through evaluating progress to date and advising the community on opportunities to improve the effectiveness of its implementation efforts after a year or more since the full team visit has passed.

DAT PARTICIPANTS

- **Local steering committee:** Committee of community members formed to manage the community obligations of the SDAT. This committee must include members of the diverse stakeholder groups.
- **SDAT team leader:** The team leader is a professional with substantial SDAT experience who will select and lead the team assigned to a particular SDAT effort.
- **AIA Staff:** AIA representatives who guide the AIA's participation in the SDAT process from the pre-application through implementation phases.
- **SDAT team:** A group of multidisciplinary professionals selected to assist a community during the SDAT process. All team members, including the team leader, volunteer their time and professional expertise.
- **Implementation committee:** Committee of community members formed to manage the implementation of the DAT recommendations. Some or all of these individuals may have served on the steering committee as well.
- **Community Members:** The success of the SDAT is dependent upon the involvement of an inclusive and wide-ranging spectrum of community members and residents in order to ensure decision-making that has broad public support and ownership and that is representative of the community as a whole.
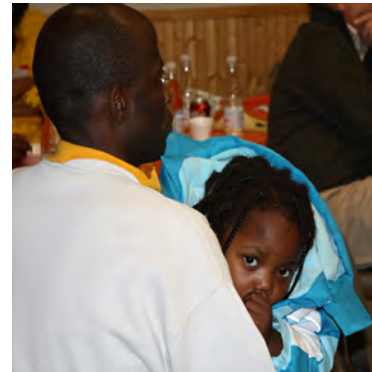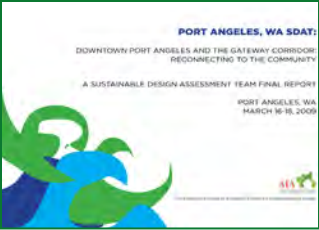
WHAT ARE THE RESULTS OF THE DAT PROCESS?

SDATs have led to new construction and development, new public agencies and organizations, new parks and open space, new zoning ordinances, political change, affordable housing, commercial and economic revitalization, preservation of historic districts, landmark preservation, pedestrian systems, comprehensive plans, changes in growth patterns, and cessation of inappropriate development.

Tangible products include:

•   A coherent description of the community's condition and the challenges that must be addressed. This statement, generated by the steering committee during the application process, is frequently a community's first citizen-based self-analysis.

•   A professional report that both examines the community's concerns and aspirations and recommends a vision for the future, specific action items, and timetables for implementation.

•   Continued guidance and advice from the team and AIA staff as the community moves forward with implementation.

Intangible products frequently include:

•   A new or renewed sense of purpose and direction

•   An objective look at the community

•   Increased energy and commitment
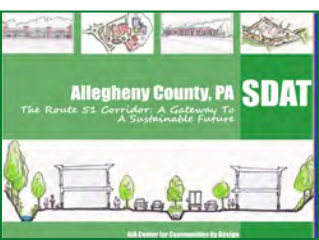
•   New levels of cooperation and collaboration throughout the community

•   Consensus on community concerns

•   Improved communication networks throughout the community

PROGRAM COSTS

The Sustainable Design Assessment Team is not a traditional grant program. Awarded communities receive pro bono services through the program, and the AIA commits to funding up to $15,000 for each project to cover team expenses. Recipient communities are required to make a one-time payment of $5,000 to the AIA as a cash match to the program. They are also required to cover any costs above the $15,000 ceiling should cost escalations occur.

Most communities raise additional funds or secure in-kind donations in order to cover local costs associated with project implementation (public outreach materials, meeting and facilities, etc).

The community is often able to provide in-kind contributions of meeting and work space, meals, or other direct out-of¬-pocket expenses typically covered by AIA. Generally, the cash match covers team travel to the site, lodging, living expenses, and report production. All of the team's time is donated.

Experience has shown that the best way to create broad community support is to ask everyone to contribute rather than relying on one major funding source. Funding and donations should ideally come from a variety of public and private sources, which might include businesses, local governments, nonprofits, foundations, organizations

such as the chamber of commerce, arts councils, the local AIA component, and other community groups and individuals.

COMMON PITFALLS TO AVOID

No process can be error-free, but avoiding the common pitfalls listed below can help ensure success.

1. **Inadequate or inaccurate information** - Inadequate and inaccurate information (either in the information package or during the SDAT team visit) will result in unnecessary time spent on background research and less time for problem solving.

2. **Insufficient representation and participation at open public hearings -**The team will have inadequate information about the community and will not hear from citizens who may have the most at stake.

3. **Insufficient local support** - If elected officials or community leaders are not actively involved in the local steering committee process or are not available during the visit, implementing an action plan is difficult if not impossible. Poor citizen attendance discourages team members and limits their access to information. Insufficient public interest in the process will hinder communication and long-range success.

4. **Uninvolved movers and shakers-** If the individuals who are critical to the implementation of a plan are left out or are apathetic, the best intentions will be thwarted.

5. **Logistical failures of equipment or people –** Malfunctioning printers, copiers, scanners, or projectors may result in frustration and inhibit productivity; mismanaged schedules waste time and limit team access to essential resource people; and equipment breakdowns delay production.

6. **Well-intentioned disruptions -** Too many social events during team visits, inappropriate interruptions, and local people who become overly involved and attempt to act as team members or who have their own agendas can all hinder the efficiency of the process.

7. **Insufficient funds or underbudgeting -** The project will not proceed until the community can meet their local cash match. Timing the DAT so that it is not delayed by fundraising will allow the process to go more smoothly.

8. **Inadequate media coverage -** Media coverage is critical to the success of the DAT in terms of increasing both public participation in the process and public awareness of the recommendations made in the report.

9. **The noble champion -** If one person on the steering committee tries to do all the work, the inclusive collaboration that is the key to success will be lost.

Phase 1: Getting Started

The first phase of the SDAT process introduces the community to the program. The focus of this phase is preparation of the application, which is a critical aspect of the SDAT experience. Ideally, one person should not do all the work. The SDAT process is inclusive, and this is the time to begin making connections within the community that will provide the support needed to sustain the entire four-phase process.

Because they are underwritten by AIA, Sustainable Design Assistance Team projects are selected on a competitive basis among communities. Each fall, applications are submitted to AIA, who then selects the projects for the following year.

1. **Call or write the AIA -** DAT program staff can provide resources and contacts to help you decide whether a DAT is right for your community. Staff can be reached at (202) 626-7492, or at communitiesbydesign@aia.org .

2. **Establish a steering committee-** The steering committee is made up of a variety of local people who have made a commitment to the SDAT process—community leaders who can get things done. Committee members might come from the chamber of commerce, Main Street programs, municipal planning and development office, downtown associations, public-private partnerships, nonprofit community development corporations, developers, banks, local businesses, professional firms or organizations, and community groups. Be sure to contact your local AIA component at the earliest stage. (Call us if you don't know how to contact your component.) The committee must be large enough to get the work done. The size and structure of the steering committee depend

on the needs and resources of the community. The first—and ongoing—task of the steering committee is to stimulate enthusiasm and support for the program in the community. Interest must be solicited from all corners— from banks to city hall, from neighborhood groups to the media. Through conversations with community stakeholders, the committee will gain greater understanding of local problems and begin to see the potential in bringing together diverse groups in the community. The steering committee will decide when and if to formally apply for a DAT.

3. **Prepare the application-** When the preparation of your application, please see the AIA Communities by Design webpage. AIA staff will also help guide you through the application process.

4. **Evaluation of Application -** The AIA will send a letter or email to the steering committee notifying them of the status of the application. If the application is approved, the AIA will also send a short memorandum of understanding outlining the responsibilities of the AIA and the community during the SDAT process.

Phase 2: Getting Organized

The second phase of the DAT process is critical to preparing the community for the DAT team visit. This is when resources are gathered that will be crucial to the team's understanding of your community and thus to its ability to work effectively. Use this time to generate excitement about the process and encourage broad community participation—the keys to ensuring a positive future for your community.

1. **Expanding the steering committee-** The steering committee will create continuity and inclusiveness throughout the DAT process. The steering committee must work hard to make sure key groups are involved in the process:

o *Citizens*: Citizen participation is a cornerstone of the DAT process. Citizens have often revealed problems not apparent to the decision-making sector and DAT teams have, on occasion, rejected directives from the establishment that seemed to conflict with the needs of the people of the community. The steering committee should be sure to involve citizens and community groups not usually engaged in the political process. Citizens who are affected directly or indirectly by development issues may not turn up at a meeting without encouragement.; the steering committee will need to identify these groups and solicit their participation in the public sessions.

o *Public officials*: Local elected leaders must recognize the potential of the SDAT process and agree to participate. Public officials and agencies should be encouraged to pool data, collaborate, and work supportively before and after DAT visits. Including some of the leaders who can most effectively encourage the participation of their peers on the steering committee is generally a good idea.

o *Stakeholders and opinion leaders (movers and shakers):* Identify now those people who are key to the eventual implementation of an action plan. If these people are not key members of the steering committee, devise a process (e.g., an advisory council, informational lunches, briefing sessions.) that will promote their interest in the DAT effort. These people must have a sense of ownership in the process if they are to help you achieve results.

2. **Selection of a team leader-** The AIA will select your team leader based on the needs of your project. Team leaders have extensive professional experience and bring special skills to the process, including leadership, sensitivity, an understanding of community development, and an ability to orchestrate the action.

3. **Preliminary visit -** The team leader, accompanied by AIA National staff, will make a 1-1.5 day visit to your community. During the visit, the team leader will tour the community in the company of the steering committee members and meet with the steering committee, selected community leaders, planning and/or economic development officials, and representatives of the local AIA component. It is not necessary to meet with all of the potential SDAT stakeholders at this time; a concise selection will suffice for the preliminary visit. The preliminary visit should be a relatively informal informational visit; the full team visit is the proper forum for the concerted effort. The team leader and the steering committee will discuss the agenda for the full team visit at this time. A detailed discussion of logistics—including options for the work space and community meeting locations—will occur. The team leader and AIA staff will
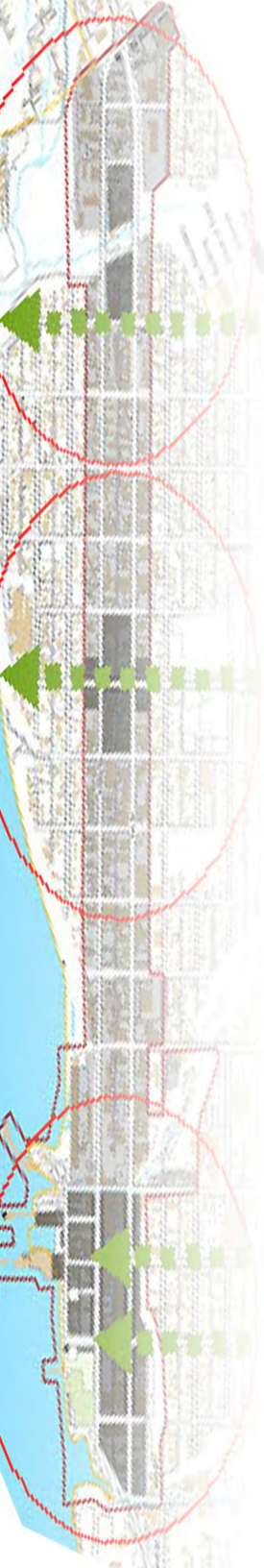
use the visit to assess the areas of expertise that should be represented on the team.

4. **Local AIA component-** Be sure to ask your local or state AIA component for help. Component members are likely to include architects and allied professionals who are familiar with the process and eager to participate. Local AIA members can help you with organizational, logistical, and technical issues and frequently serve as a valuable resource to the team.

5. **Setting a date for the team visit-** The visit should not be scheduled in conjunction with any other local conference, meeting, or event. Experience has shown that these dilute the effectiveness of a DAT, which works best when it is the "only show in town." Consider the implications of other significant events such as elections and the timing of other studies or public initiatives.

6. **Team selection-** Your team leader and AIA staff will select team members who match the needs of your community. The all-volunteer team will consist of highly skilled professionals representing a variety of disciplines.

7. **Student Participation-** Architecture students and students in related disciplines can be an important part of the team visit. Performing assignments in support of the team's work, they can contribute to a more complete report. The heads of participating school(s) of architecture or planning should be asked to recommend their most talented students. The criteria for student participation are the students' understanding of the principles of urban design and planning and a talent for drawing computer graphics. Students must have the ability to work intensely in collaboration with others. Their specific roles will vary with their skills and experience and can be a major learning experience. The team leader will determine the number of students required and their disciplines; selections are at the leader's discretion. The students will serve under the direction of the team leader.

8. **Media and public relations-** An effective media plan is essential to success. A media and public relations subcommittee should refine the details of the media plan and begin to implement items that will continually promote community awareness and enthusiasm.

9. **Budget-** The community's $5,000 cash match is due with the signing of a Memorandum of Understanding with the AIA. Remember that team members donate several days of their professional and personal time to serve on a SDAT team and their only compensation is the intellectual stimulation of the experience. Because of this, they should be treated as highly regarded guests, and the budget should provide for comfortable, convenient travel arrangements and accommodations. As such,
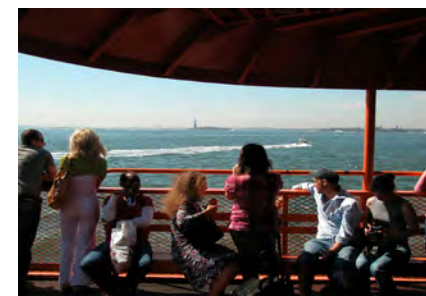
in-kind contributions may be used to both encourage community buy-in and defray hard costs throughout the project. Many budgeted items may be donated by local organizations, including meals, vans, meeting & work space, and work materials.

10. **Preparing the information package –** The AIA will provide the community with access to an FTP site. The community should upload any information that might prove helpful to the team as background information on the community, including but not limited to previously completed reports, planning documents, website links, and maps.

Phase 3: Team Visit

The focus of the SDAT process is the team visit. This is an exciting time for the community. Broad citizen participation and media attention, combined with the energy and commitment of the team, can inspire a community with newfound confidence and optimism, which will fuel the implementation phase of the process.

1. **Schedule-** A detailed schedule should be developed in collaboration with the team leader. Sample agendas for both preliminary and full team visits can be found later in this document. Each DAT will be different, based on the community's needs and resources. An SDAT is typically held over three days during the work week, preferably adjacent to a weekend so that volunteers can limit the number of days they need to take off from work as much as possible.

2. **Team introduction –** Since each SDAT team is tailored to the needs of the individual communities, most SDAT team members have never worked with each other before. The team typically arrives the evening before the formal SDAT begins. The national team members will likely meet for a dinner to become acquainted and prepare for the SDAT.

3. **Team tours-** It is important to provide the team with a good sense of the entire community. Team tours are often conducted using a number of combinations, including bus, foot, and air tours.

4. **Interviews with community leaders and resource people**- The team will meet with many diverse groups and stakeholders. In order to make the most of their limited time in the community, team members will break into concurrent stakeholder groups that are organized by topical subjects. Those subject matters will be established well before the full team visit, and team members will be chosen based upon their expertise and knowledge of the pertinent subject matter. The steering committee should coordinate the interviews well in advance, and proposed schedules should be reviewed with the team leader. Careful scheduling is important to avoid overwhelming the team or the meeting space and to conserve people's time. Each National Team Member will direct the conversation at their specific stakeholder session. Having student or steering committee volunteers available to take notes on large pads and easels so that the team members can focus on the conversation is very helpful. Interviews with such groups are best held in a setting that will encourage informal, candid

conversation. Team members may wish to talk again with individuals who have appeared, so it is important to make sure of their availability and to keep a record of those who attend, along with their telephone numbers or email addresses. Groups that should be represented include:

- o Mayor and city council (or your community's equivalent)
- o Planning board and its key staff
- o Municipal agencies and authorities (transit, housing, public works, economic development, etc.)
- o County/regional authorities and agencies and their key staff
- o Chambers of commerce
- o Downtown or area businesspeople
- o Community groups
- o Community service organizations and other major non-profits
- o Developers and real estate professionals (nonprofit and for profit)
- o Public and private school systems and colleges or universities
- o Environmental, historic preservation, and other groups

5. **Meeting with citizen groups-** A "town hall meeting" is held by the team on the evening of the first day at a location considered to be a neutral space. Considerable effort must be made to get people to turn out—notices must go out to various organizations well in advance and follow-up phone calls made the day before. Prior media coverage is essential. The team leader will moderate the meeting. At the team leader's discretion, the team may divide into groups to facilitate communication. Participants should include:

- o Neighborhood organizations
- o Community development corporations

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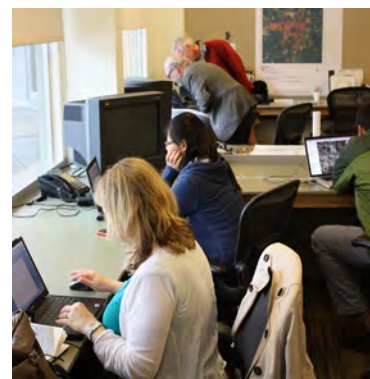
- o Business groups and individual business owners and managers
- o Church groups
- o Chief of police
- o PTAs
- o Senior citizens
- o Teenagers and youth groups
- o Ethnic groups
- o Businesses and business organizations
- o Environmental organizations
- o Preservation groups and historical societies
- o Interested Residents

6. **Teamwork -** The team works very intensively in three phases, which occasionally overlap:
   - o Understanding: learning about your community and its concerns
   - o Creating: generating ideas that respond to your issues
   - o Producing: preparing the report and the public presentation

Some members will withdraw from the central activity of the team visit to write or consult with resource people. Others will spend more time interacting with other team members and the public. The team leader and AIA Staff are responsible for development and final assembly of the presentation.

7. **Public presentation -** The final presentation to the entire community should be well publicized. Media representatives should be specifically invited. The team will make a PowerPoint presentation of its observations and recommendations for about an hour and will take questions for the remaining amount of time.

Phase 4: Implementation

In this phase, the community begins to translate the team's report into an action plan for implementing the vision for its future developed during the SDAT process. This phase begins within a week of the conclusion of the team visit.

1. **Form an Implementation Committee-** The membership of the implementation committee should reflect constituencies affected by potential changes in the community, the commitment of individuals and groups they represent to the effort, and the need for certain skills during this phase. The committee should remain nonpolitical and broadly representative of the community. Continuity provided by including original steering committee members is valuable, but new members can make important contributions. The implementation committee's structure must respond to a new agenda:
   - o Review the team's report (months 1-2)
   - o Identify immediate and short-term objectives (months 2-3)
   - o Develop long-range goals and objectives for implementation within the next 3-5 years (months 4-6)
   - o Produce an action plan based on the above items (months 4-6)
   - o Maintain broad community involvement and interest (ongoing)
   - o Support implementation efforts (ongoing)

2. **Review the team's presentation and report** - The implementation committee should develop an immediate strategy for discussing the report, identifying priorities, and determining which areas need further attention. As soon as possible, the committee should obtain endorsements and commitments from public officials for the presentation recommendations for which there is

consensus. To maintain the inclusive spirit of the SDAT process, solicit feedback from involved groups and individuals as well as other interested parties. Maintaining a database of those who participated in the earlier phases makes it possible to solicit feedback through mailings and encourage continuing interest. This work should be completed within a few weeks of the team visit in order to maintain momentum.

3. **Produce an action plan** - After soliciting broad community participation in the development of goals and objectives, the implementation committee should produce a document that will become the community's action plan. The outline for this document will vary, but it should include a clear description of the community's vision for its future; a statement of long-range goals; a list of objectives to be achieved over the next three to five years, including identification of kickoff projects that can be completed in the next 12 months; a summary of actions needed to achieve the objectives; and a funding strategy identifying sources of funding. Include a map of the community that shows where funds will be spent and where projects will be completed. This map will be the basis for describing your overall community strategy.

The success of the action plan depends on people seeing results quickly—the momentum that builds with short-term achievement can sustain a community for years to come. Identify a few achievable, high-visibility projects that are certain of early success and support the long-range goals. Consider projects that are likely to energize the community and expand the number of people who will

help implement the overall plan. A community with the goal of revitalizing its downtown, for example, might identify projects such as hiring a downtown-events coordinator, razing a condemned eyesore, establishing a visitors' center, creating a volunteer cleanup program, arranging tours for potential investors, or approving projects already in the budget pipeline.

After discussing the report, the implementation committee defines the community's goals and priorities over the next three to five years and identifies objectives that will help you achieve them. There are many ways to accomplish this, but whatever the process, the implementation committee must remain open and responsive to community feedback. To revitalize its downtown, for example, a community's long-term objectives could include relocating town offices from a highway site to the business district, developing a new traffic plan, restoring historic building façades, or establishing a special-assessment business-improvement district. A good action plan will include benchmarks and triggers for action—ways to measure your progress and successes that will allow

Facade Improvement Before

Facade Improvement After

the community to celebrate its achievements. Benchmarks will vary with your objectives but might include enactment of regulatory changes; completion of buildings, parks, or infrastructure improvements; and statistical measurements, such as a 25 percent increase in tourist traffic or a donor-participation target in a community-projects fund. Solicit endorsement of the action plan by political leaders, and be sure to follow through with newly elected officials. Future political candidates should understand the plan and the grassroots process behind its development.

4. **Maintain broad community involvement and interest** - Develop a public relations strategy to maintain the visibility of the SDAT process and encourage continuing participation. Distribution of the action plan should receive special attention, but establishing an ongoing presence in the community is equally important. The committee might sponsor events like public meetings, workshops, or leadership retreats, or partner with other community groups to sponsor events like local heritage-day celebrations, festivals, and gala evenings.
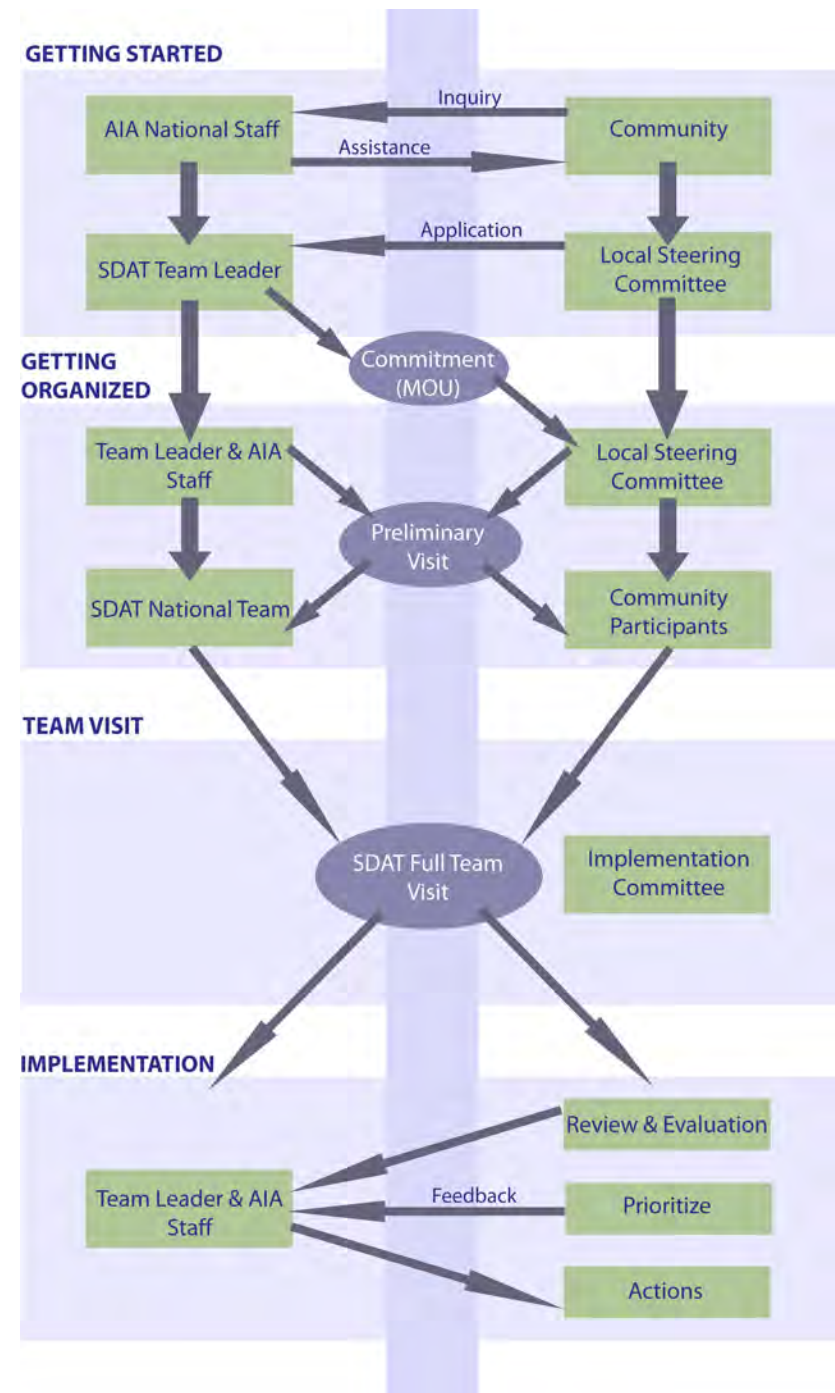
Roles and Responsibilities for Participants in Each Phase of the SDAT Process

Participants	Phase 1: Getting Started	Phase 2: Getting Organized	Phase 3: Team Visit	Phase 4: Implementation
Local Community: Individual citizens and leaders, community groups, private and nonprofit organizations, businesses, government agencies and officials.	A local leader contacts the Center for Communities by Design for information about the program and on first steps. The community begins to educate its citizens and build support for an SDAT.	Citizens and leaders learn about the process, local issues, and the need for their participation in the overall process.	The public is invited to participate in the SDAT through open public meetings, scheduled interviews, and the final presentation.	The public is invited by the local steering committee to participate in meetings and events to review and discuss the SDAT report.
Local Steering Committee: Group formed to guide the DAT process.	A steering committee is formed to manage local activities and to establish a dialogue with the SDAT program. An application describing local needs and issues and indicating committed financial support is submitted to the SDAT program.	The steering committee is expanded to represent a wide range of community interests. Preparations are made for the team visit. Briefing and background materials are compiled for the team prior to their visit.	The steering committee hosts the team visit and participates as a community resource.	The steering/implementation committee reviews and evaluates the SDAT recommendations and develops short-and-long range objectives and priorities. An action plan and timetable are produced, and short-term projects are implemented.
AIA Center for Communities by Design	Staff members begin a dialogue with the steering committee; review the application; and assist the community with the completion of the applications as necessary.	Staff selects a team leader who visits the community for a preliminary round of meetings with local leaders and citizens to review the logistics for the full team visit. The team leader and AIA staff select a multidisciplinary team of professionals to visit the community.	The team visits the community, listens to citizens, and makes recommendations for taking action.	Team members remain in contact with the community and provide additional guidance and recommendations as the community works to implement the SDAT recommendations.

Sample SDAT Agenda: Preliminary Visit

Date/Time	Activity	Location	Participant
Day 1			
8:00 am - 9:00 am	Introductions, Project Goals, Background Information	Meeting Room	Steering Committee, Team Leader, AIA Staff
9:00 am - 12:00 pm	Tour of Community	Community/Region	Selected Steering Committee Reps, City staff, Team Leader, AIA Staff
12:00 pm - 1:00 pm	Lunch	TBD	Steering Committee Reps, Team Leader, AIA Staff
1:30 pm - 2:30 pm	**Stakeholder Meeting #1** (Topic determined from issues identified in the SDAT applications)	Meeting Room	Steering Committee Reps, Invited Stakeholders, Team Leader, AIA Staff
2:30 pm - 3:30 pm	**Stakeholder Meeting #2** (Topic determined from issues identified in the SDAT applications)	Meeting Room	Steering Committee Reps, Invited Stakeholders, Team Leader, AIA Staff
3:30 pm - 4:30 pm	**Stakeholder Meeting #3** (Topic determined from issues identified in the SDAT applications)	Meeting Room	Steering Committee Reps, Invited Stakeholders, Team Leader, AIA Staff
4:30 pm - 5:30 pm	**Stakeholder Meeting #4** (Topic determined from issues identified in the SDAT applications)	Meeting Room	Steering Committee Reps, Invited Stakeholders, Team Leader, AIA Staff
5:30 pm - 6:30 pm	Break		
6:30 pm - 8:30 pm	Dinner	TBD	Steering Committee Reps, Team Leader, AIA Staff
Day 2			
9:00 am - 10:00 am	**Stakeholder Meeting #5** (Topic determined from issues identified in the SDAT applications)	Meeting Room	Steering Committee Reps, Invited Stakeholders, Team Leader, AIA Staff
10:00 am - 11:30 am	Logistical Meeting with Steering Committee	Meeting Room	Steering Committee, Team Leader, AIA Staff
11:30 am	Team Leader and AIA Staff Depart		

Sample SDAT Agenda: Full Team Visit

Date/Time	Activity	Location	Participants
Day 1			
8:30 am - 9:00 am	Introductions, Goals, Background Information	Meeting Room	Steering Committee, SDAT National Team
9:00 am - 12:00 pm	Community Tour	Community/Region	Steering Committee Reps, SDAT National Team, City Staff, Other Invited Tour Guides
12:00 pm - 1:00 pm	Lunch	TBD	Steering Committee Reps, SDAT National Team
1:30 pm - 4:00 pm	Concurrent Stakeholder Meetings: 1) Topic #1 2) Topic #2 3) Topic #3 4) Topic #4 5) Topic #5	Adjacent Meeting Rooms	Steering Committee, SDAT National Team, Designated Stakeholders
4:30 pm -5:30 pm	SDAT National Team Meeting	Meeting Room	SDAT National Team
6:00 pm - 7:30 pm	Town Hall Meeting (Open to the Public)	Auditorium	SDAT National Team, Steering Committee, Stakeholders, Community Members
7:30 pm - 9:00 pm	SDAT National Team Meeting and Dinner	TBD	SDAT National Team
Day 2			
9:30 am - 11:30 am	Concurrent Stakeholder Meetings: 1) Topic #1 2) Topic #2 3) Topic #3 4) Topic #4 5) Topic #5	Adjacent Meeting Rooms	Steering Committee, SDAT National Team, Designated Stakeholders
12:00 pm - 1:00 pm	SDAT National Team Lunch and Meeting	TBD	SDAT National Team, Steering Committee Reps
1:00 pm - 9:00 pm	SDAT National Team Working Session	Team Workspace	SDAT National Team, Students, Local Professionals
Day 3			
8:00 am - 5:30 pm	SDAT National Team Working Session and Presentation Production	Team Workspace	SDAT National Team, Students, Local Professionals
6:00 pm - 8:30 pm	SDAT Final Presentation (Open to the Public)	Auditorium	SDAT National Team, Steering Committee, Stakeholders, Community Members

SDAT LOGISTICS

Good logistics are critical to a smoothly functioning SDAT process. Steering committee members will work with the AIA staff to ensure that logistical needs are accommodated prior to and during the team's visit.

ROOM AND BOARD

The place selected for team lodging should be close to the center of the study area and near the SDAT work space. Each member should have an individual room as they sleep at different times. Wireless internet access in each room is important if it is available. The AIA will make these arrangements based on the steering committee's recommendations.

Breakfasts are a time for the SDAT team to meet on their own. Lunches are usually casual and often served in or near the SDAT work space or on tours. Evening meals are more of a respite from the day's activities. Informal discussions among team members, students, and steering committee members typically continue during meals. The schedule may necessitate bringing a number of meals to the team workspace.

STEERING COMMITTEE PARTICIPATION

Because steering committee members will have primary responsibility for developing the eventual action plan, their continuous involvement is critical to the eventual success of the project. The AIA and the steering committee chair should discuss how the committee will be involved during the team visit to ensure maximum ownership of the process after the team finishes its work.

TRANSPORTATION

For the team visit, members will typically arrive the evening before the SDAT and depart the morning after. Arrangements for team member ground transportation to and from the airport will be coordinated by the AIA Staff. During the team visit, the AIA will typically arrange for at least one rental car to transport the team.

SPACE NEEDS

Three types of space are required—a work space where most of the team's work will be done during the visit, a space for community meetings, and a space for the final presentation. The team leader should review all the options available on the preliminary visit before commitments are made.

WORK SPACE

The work space should be located within or adjacent to the primary study area, and should be large enough to accommodate 10-15 people comfortably. The space should be suitable for the needs of production, with good lighting, plenty of wall outlets, windows, wireless internet access, and extensive wall space to pin up drawings and other graphics. A city or municipal office, an architecture studio, or a vacant storefront in the study area can be ideal. The space must be available after business hours as the SDAT may work into the evening or night.

COMMUNITY MEETINGS

A "town hall meeting" space is needed. This space may be located nearby in a church, school, or similar public space on neutral ground. Depending on the scale of the
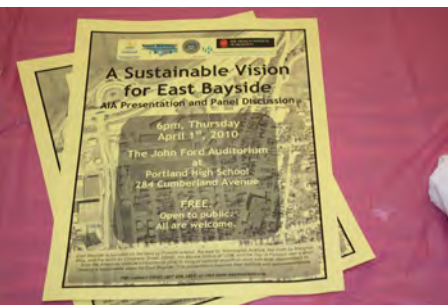
community, there should be space for 150 to 200 people in an informal setting. Microphones are necessary in a larger space.

FINAL PRESENTATION

The place for the final presentation during the team visit should have good community access and be identified as neutral ground. There should be provision for an LCD data projector and screen as well as a public address system. There should be one or two microphones for the team and one or two for citizen participation in a question/answer session following the team's presentation. The size of the space will vary according to the size of the community, but even small towns or rural regions can attract 200 or 300 people.

FURNITURE AND EQUIPMENT

The following items for the SDAT work space should be provided:

- Drawing/writing tables and chairs
- Conference tables and chairs
- Color Scanner
- Color printer

- Data projector and screen for PowerPoint presentation
- Internet access for team, preferably wireless

There should be a reference center consisting of copies of ordinances, statistics, maps, previous reports and studies, and histories. This should be under the control of a local steering committee member as some of these documents will be one of a kind. If there is a local GIS system, it should be set up on the computers in the work area.

SUPPLIES

Supplies will include materials normally found in an architect's office and should be reviewed with the AIA before the first team visit. Some SDATs, are more policy focused and may not require all of these materials. In general, the SDAT work space should be stocked with:

- Writing paper pads, 8½" x 11"
- White tracing paper, 12", 24", and/or 36" wide rolls
- Post-its
- Felt-tipped markers (Magic Markers, Design Art Markers)
- Colored pencils
- Fiber-tipped (not ballpoint) pens, with medium and fine tips, black and red
- Large newsprint pads and easels, one per stakeholder group
- T-squares, triangles, & scales
- drafting tape
- push pins
- Plain bond paper, 8½" x 11"
- Reproducible base maps of the community and study area (some of these should show building outlines)

COMPUTERS

Most team members will bring their own laptops. AIA Staff can provide extra computers for those team members who cannot bring their own machine. If multiple computers are needed, AIA staff will coordinate with the steering committee to provide additional computers.

TEAM TOUR

Planning should be done in advance for tours that will give the team an understanding of your community and its issues. The team, together with their steering committee guides, will inspect the study area by air, bus, foot—even by boat if appropriate. Regional and local maps should be provided for the team.
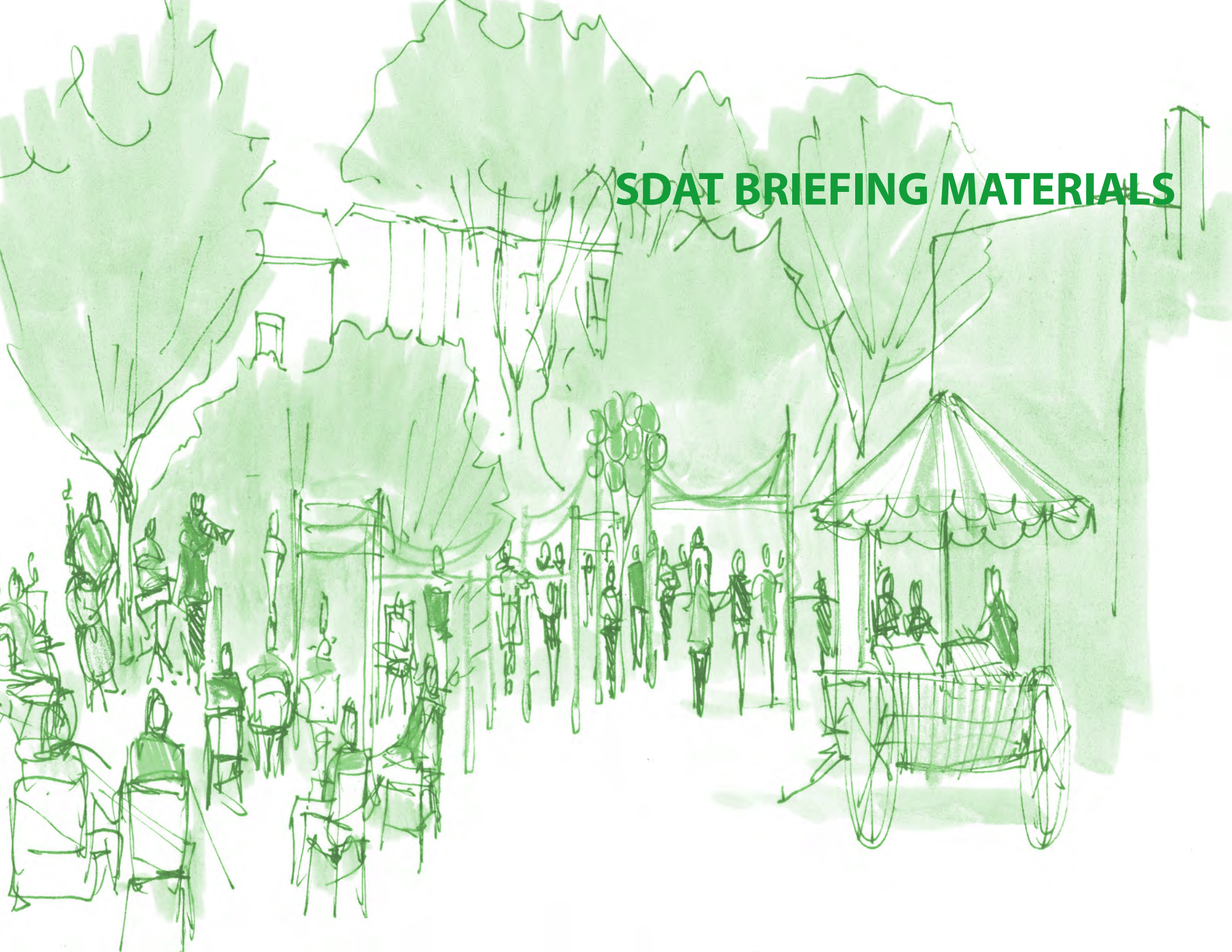
A bus or van survey should be made with everyone in a single vehicle high enough to see above traffic and with a microphone for the guide. Again, maps marked with the route are important. Many communities work with the local transit authority or municipal government to have a tour bus donated for the team tour.

SDAT BRIEFING MATERIALS

SDAT Briefing Materials

An SDAT will function much more effectively and provide a much better product for the community if they are adequately briefed on the project before they come to the community. AIA Staff will create an FTP site for the use of the team and the community. Background materials should be uploaded well before the project commences so that the team can prepare themselves before they arrive for the SDAT. In addition to the electronic copies of these documents, the team workspace should be furnished with hard copies of these materials for easy reference during the project.

Useful documents and plans include:

- **Maps of the study area, community, and regions showing:**
    - o Municipal and county boundaries
    - o Neighborhoods
    - o Local political boundaries, such as wards and parishes
    - o Topography
    - o Land use (adjacent to the study area)
    - o Streets and highways
    - o Important places (employment or shopping centers, schools, etc.)
    - o Parks, forests, lakes
    - o Public transportation routes
    - o Historic or archeological sites
- **Photographs—both aerial and street views describing the study area**
- **Population statistics, including:**
    - o Growth or decline in past 10 years
    - o Projected growth or decline
    - o Age, sex, and other household information
- **Economic data, including:**

- o Past and projected commercial and industrial values
- o Where and what the jobs are
- o Median income
- o Land values
- o Tax information
- o Brochures to attract industry, tourists
- **Zoning and other land use regulations (include maps), including:**
    - o Most recent master plan
    - o Design guidelines
    - o Growth management measures
- **Historic preservation and archeological data (if appropriate), including:**
    - o Plans or diagrams of historical patterns of development
    - o Historic district maps
    - o Local history
    - o Architectural survey
    - o Archeological survey
- **Information related to other topics to be addressed, for example:**
    - o Environmental issues
    - o Transportation
    - o Social equity issues

ACKNOWLEDGMENTS