Guidance for Facilitating the Touchstones Exercise

Purpose

The purpose of this brainstorming session is to identify and list the values and aspirations of the project team and to prioritize important issues. These "Touchstones" identify what the project team and stakeholders determine are the important design considerations that would define success. The second step in the exercise is to prioritize these and/or explore the ways that these issues are interconnected. The results of this exercise should be recorded and distributed to the team, so that these touchstones can be referenced throughout the project to ensure alignment with the team's goals.

Background

The early experiments with implementing this exercise referred to it as a "core values" exercise. At the first workshop/charrette with the project team, before talking about the project design, its components, and even its program, the facilitator simply asked the question, "What are you trying to accomplish by building this project?" . . . or "Picture yourself six months or a year after your new building is occupied, what are the characteristics that you would say about your project that made it a success?"

Soon, this question began to be asked in the context of issues associated with sustainability by identifying the following five key environmental imperatives and human social equity:

- Climate Change
- Potable Water
- Resource Destruction
- Habitat Destruction
- Pollution/Toxins
- Social Equity and Human Health

As a way of exploring this, the facilitator would open a discussion about how the team thought a successful project would address these issues – as well as others associated with the unique specifics of the project and its Place – and how they are interrelated. What primary objectives, or "Touchstones", can be identified explicitly at the outset that can help guide the team throughout their decision-making process, from conceptual design through occupancy? Over several iterations on several projects, this rather rough technique was used for capturing the team's touchstones in this context. From there, it developed further into a prioritization exercise for voting on these issues to rank them in importance.

However, it became clear over time that the prioritization piece of this exercise (the voting) can lead team members, at times, to think that some of the identified environmental issues are "less important" if they didn't get many votes. . . . but all issues are important; you can't "vote on nature." So now, the Touchstones exercise concludes by asking team members during the charrette to identify any three identified issues that are connected with the issue that got the most votes (the "number one" issue), then three more that are connected to the number two issue, and then three more with the number three issue. In this way, project teams begin to see the interconnections and how they are interrelated more than seeing each as a fragmented issue or element, or goal that can be achieved in isolation.

This is now called the "Touchstones" exercise, rather than a "core values" exercise, because it serves as an effective tool for identifying the team's goals and objectives more than it gets to the deeply held internal core values of individual and collective team members. Nonetheless, additional benefits that

should not be underestimated result from this exercise; these include: team alignment around issues, collective and individual "buy-in" of objectives, and ownership of them. The results of this exercise also contribute to creating the Owner's Project Requirements, a document utilized in the Commissioning process to track initial and evolving intentions from the beginning of design all the way though construction.

Implementing the Touchstones Exercise

What materials are required for the Touchstone Exercise?
Record the brainstorming responses on flip charts. It also is helpful, as described below, to use an Excel spreadsheet during this exercise that can be projected on the screen during steps 3 and 4.

STEP 1 – Brainstorm Aspirations – Tell attendees that the object of this exercise is to align around project goals and aspirations, so for the next 15 minutes, we want to brainstorm answers to the following question: "A successful project would address what key issues?" . . . in other words: "What are you trying to accomplish by building this project?" . . . or "Picture yourself six months or a year after your new building is occupied, what are the characteristics that you would say about your project that made it a success?"

Ask attendees to volunteer answers out loud and record them on flip charts. It also is helpful to have your assistant record the identical responses in column "B" of an Excel spreadsheet similar to the "Example Results – Step 1" tab in the attached "Touchstones Results Example" file (as depicted in *Figure 1* below). Generally, you can expect to receive somewhere between 20 and 30 different responses.

Note that part of the facilitator's job during this exercise is to ask respondents to "essentialize" the responses into simple short phrases that are specific – and to identify redundant responses; it is helpful to keep in mind the above-referenced five environmental imperatives and the Green Communities criteria as the context for guiding responses.

STEP 2 – Prioritize Issues and Record Results – Now explain that we are going to take another 15 minutes to prioritize the responses. To do so, members of the team representing the owner get 20 votes, and everyone else gets 10 votes. Ask everyone to record on a piece of paper how they would assign their votes across the list of identified goals; they can assign their votes in any way they wish. For example, all 10 of a non-owner's votes can be assigned to a single issue, or one vote can be assigned to each of 10 different issues, or 5 votes can be assigned to one issue, 3 to another, and 2 to another, and so forth in any combination. Allow about 5 minutes for attendees to record how they would like to allocate their votes.

Ask if everyone is ready, then, point to the first item on the flip chart list and ask all attendees who have assigned votes to that issue to indicate how many by raising their hands with raised fingers indicating how many votes they would like to assign to that issue, and count the total votes; then write the total number of votes next to that issue on the flip chart. Do the same for each listed issue . . . and then break for lunch.

During the lunch break (or next break), rewrite the list, ranking in order from top to bottom the top vote-getter to the lowest. The Excel spreadsheet is quite useful for this step, by entering the number of votes in column "C" of an Excel spreadsheet similar to the "Example Results – Step 2" tab in the

attached "Touchstones Results Example" file (as depicted in *Figure 2* below); you can "custom sort" the spreadsheet by value from highest to lowest, which then will put the list in the order of highest to lowest in terms of the votes that each issue received.

You can then input numbers in column "A" to identify the ranking of each issue, as indicated in the example. Then highlight the number one issue's cell in pink (in column B), the number two cell in green, and number three in blue. After lunch, project this spreadsheet onto the screen, and briefly review the results.

	A	B
1		**Touhstones Results Example** (enter project name)
2		1/10/2011 (enter charrette date)
3		
4		**Touchstones**
6		Aesthetics
7		Building systems on display
8		Community asset/attraction
9		Controllability of systems
10		Daylighting
11		Enhance local labor opportunities & expertise
12		Habitat regeneration
13		Indoor air quality
14		Integrated recycling process celebrated
15		Integrated with natural environment
16		Inviting
17		Limit light pollution
18		Maximize energy efficiency/Minimize CO2 emissions
19		Obvious model of sustainability
20		Pedestrian friendly
21		Performance M&V
22		Promote alternative transportation
23		Promote occupant health
24		Recharge local aquifer
25		Renewable energy utilization/demonstration
26		Renewable resource use
27		Stormwater management
28		Thermal comfort
29		Use of local materials
30		Within budget
31		
32		

Example Results - Step 1 | Example Results - Step 2 | Example Results - Step 3 | Example R

Figure 1 – Example of Step 1 list of issues

	A	B	C
1		**Touhstones Results Example**	
2		10-Jan-11	
3			
4		**Touchstones**	**# of Votes**
5			
6	1)	Integrated with natural environment	42
7	2)	Maximize energy efficiency/Minimize CO2 emissions	36
8	3)	Within budget	30
9	4)	Obvious model of sustainability	29
10	5)	Promote occupant health	28
11	6)	Renewable energy utilization/demonstration	25
12	7)	Aesthetics	22
13	8)	Habitat regeneration	21
14	9)	Community asset/attraction	20
15	10)	Daylighting	15
16	11)	Use of local materials	14
17	12)	Integrated recycling process celebrated	13
18	13)	Promote alternative transportation	12
19	14)	Indoor air quality	11
20	15)	Controllability of systems	10
21	16)	Pedestrian friendly	10
22	17)	Inviting	9
23	18)	Building systems on display	9
24	19)	Enhance local labor opportunities & expertise	7
25	20)	Renewable resource use	7
26	21)	Performance M&V	6
27	22)	Thermal comfort	5
28	23)	Recharge local aquifer	4
29	24)	Stormwater management	2
30	25)	Limit light pollution	2
31			

Example Results - Step 1 | Example Results - Step 2 | Example Results - (

Figure 2 – Example of Step 2 prioritized list of issues

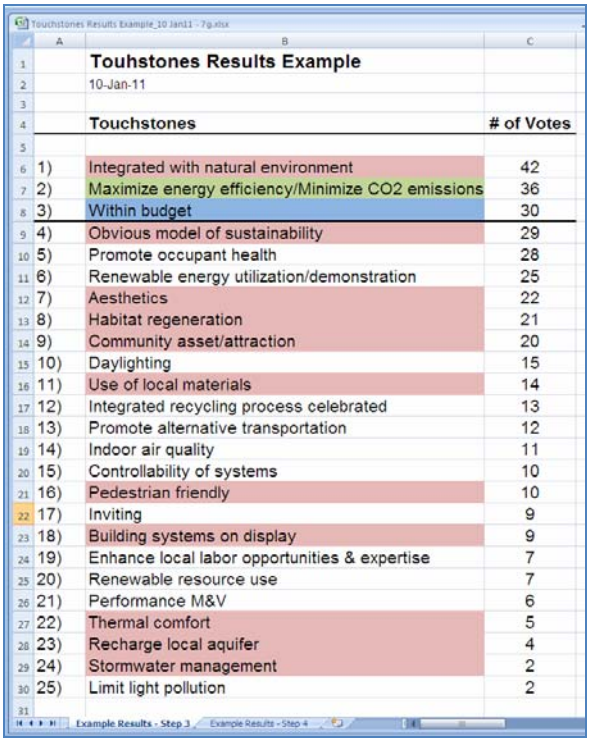
STEP 3 – Identify Initial Interrelationships – The last two steps are intended to reveal the interconnectedness and interrelationships between the identified issues, so that they are not perceived as fragmented issues, but rather, a deeply interconnected whole. Ask attendees to identify (and record on a piece of paper) three issues on the list that are related to achieving the #1 issue (the cell that is highlighted in pink); then ask them to record three more issues that are related to the #2 issue (highlighted in green) and three more related to #3 (highlighted in blue).

Give the group 5 minutes to record their responses; then ask for a volunteer to read the three issues that they have identified as related to #1 and highlight the cells for each of these issues pink (in column B) while projecting the spreadsheet on the screen. Ask 3 or 4 more volunteers for the issues that they identified as related to issue #1, and highlight these cells in pink as well, similar to the spreadsheet in "Example Results – Step 3" tab in the attached "Touchstones Results Example" file (as depicted in *Figure 3* below).

STEP 4 – Identify More Interrelationships – Next, ask another volunteer to read the three issues that they have identified as related to the number #2 issue (highlighted in green) and highlight the cells for each of these issues green (in column B), still projecting the spreadsheet on the screen. Again, Ask 3 or 4 more volunteers for the issues that they identified as related to issue #2, and highlight these cells in green as well. When any issue that is already highlighted pink in column B is also identified as related to issue #2, then highlight column A on the line for that issue in green, thereby identifying that issue as related to both the first and second issues (pink AND green).

Now ask another volunteer to read the three issues that they have identified as related to the number #3 issue (highlighted in blue) and highlight the cells for each of these issues blue (in column B), still projecting the spreadsheet on the screen. Once again, ask 3 or 4 more volunteers for the issues that they identified as related to issue #3, and highlight these cells in blue as well. It is likely that most issues already will be highlighted in either pink or green in column B, so for any such issues, highlight column A on the line for that issue in blue, thereby identifying that issue as related to two of the three top-ranked issues. It also is likely that several of the issues will already be highlighted with two colors (pink and green), so for any of these issues, change the highlighted color for to purple in column B if they also are related to issue #3, thereby indicating that issue is related to all three top-ranked issues (see "Example Results – Step 4" tab in the attached "Touchstones Results Example" file, as depicted in *Figure 4* below).

Continue for another round or two of asking volunteers for the issues they identified as related to the top three until it becomes evident that continuing much further would result in most or all of the issues being highlighted in purple, thereby related to all three! . . . often, someone in the audience will make this observation, at which point, you can simply wrap up with a brief discussion about how all of these issues are inter-related, which at this point has become experientially self-evident.



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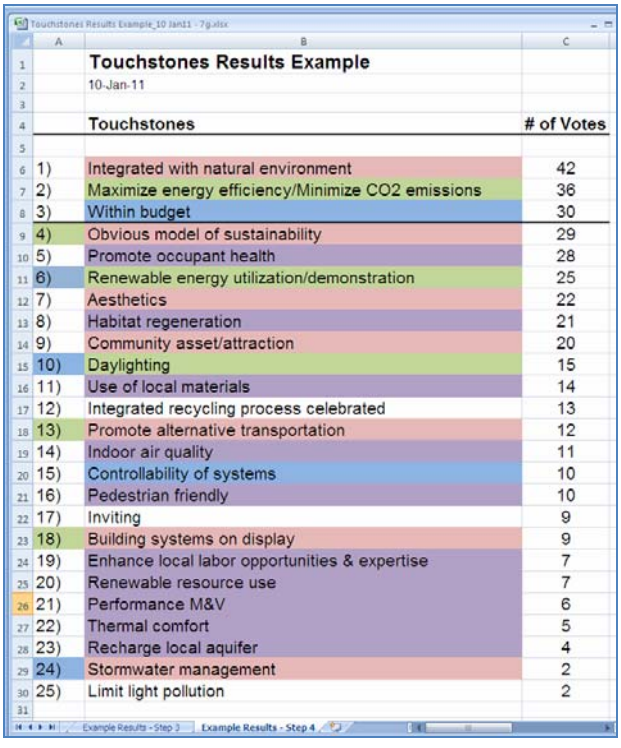
11)		Use of local materials	14
12)		Integrated recycling process celebrated	13
13)		Promote alternative transportation	12
14)		Indoor air quality	11
15)		Controllability of systems	10
16)		Pedestrian friendly	10
17)		Inviting	9
18)		Building systems on display	9
19)		Enhance local labor opportunities & expertise	7
20)		Renewable resource use	7
21)		Performance M&V	6
22)		Thermal comfort	5
23)		Recharge local aquifer	4
24)		Stormwater management	2
25)		Limit light pollution	2

Figure 3 – Example of Step 3, first round of identifying interrelationships



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22)		Thermal comfort	5
23)		Recharge local aquifer	4
24)		Stormwater management	2
25)		Limit light pollution	2

Figure 4 – Example of Step 4 after a few rounds of identifying interrelationships