

Charette

A handbook on a widely used and very effective design and planning technique.

What is a Design Charette?

A Charette is an intense effort to solve any architectural problem within a limited time. From a creative standpoint, a Charette can be divided into three portions:

1. **Listen.** Listen to what the financial backers, realtors, owners, and other specialists have to suggest. Work together with them and members of the business or community to come to an understanding about the project, what their goals and limitations are, and how these might fit with your ideas.
2. **Envision.** Imagine together all of these various considerations to come up with a realistic and creative proposal which will be interesting while at the same time financially, environmentally, and otherwise feasible.
3. **Draw FAST!** A Charette requires the ability to work with a creative team who can bring ideas to a tangible design sketch quickly, allows for instant communication ... a picture is worth a thousand words!

How Can A Charette Facilitate the Building Process?

There are two main advantages to working in the context of a charette. The first is that a charette operates in a highly collaborative atmosphere. Instead of an architect taking ideas and plans and going away to develop them on his or her own, a charette allows for the participation of everyone involved with the project, resulting in a highly charged and creative atmosphere. The inclusion of many points of view results in well-rounded and realistic proposals, with everyone satisfied that they were able to contribute. Secondly, Charettes are fast, and relatively inexpensive. In the initial stages of a project, the venture is necessarily highly speculative. It is important to keep costs at bay, while also moving forward quickly to take advantage of changing situations and often-prohibitory deadlines. Charettes offer the opportunity to work safely and effectively within both of these boundaries.

History of the term Charette

In 1821, L'Ecole Des Beaux-Arts in Paris, became the world's first School of Architecture. Classes were held at the school, and the students lived in apartments around the City. The term "Charette" (French for wagon) refers to Architecture students, who needed to rush their drawings to L'Ecole Des Beaux-Arts for a critique: they placed the drawings on a cart while still adding some finishing touches.

Later the word broadened its meaning and came to describe any intense, short-term design project. Today the architectural community uses the word to describe any intense, on-the-spot design effort.

AIA

The American Institute of Architects (AIA) now commonly provides design charettes to qualified communities around the country, by bringing together design experts for an intense 3-day effort, called RUDAT (Regional Urban Design Assistance Team). This is most often done for community planning, and used by professionals for specific projects, especially those in remote locations.

AIA design charettes in Missouri include the Trailhead Park in Columbia, the State Fair in Sedalia and the Prison in Jefferson City.

Peckham & Wright Architects (PWA) has used the design charette tool for most of the firm's 25-year history. These include: Columbia - Community United Methodist Church; Columbia Recreation Center - Master Plan and Program; Marshall - Butterfield Youth Services & Missouri Valley College Library; Moberly - Municipal Auditorium Renovation; Boonville - Boonville Aquatic Center & Boonville Community Center

DESIGN CHARETTE

A Design Charette is the business of providing Master Plan & Facility Development Concepts. Specifically, a Design Charette provides quick schematic plans for scope, costs & optional project concepts during short feasibility periods. This process provides effective and creative market-driven designs for all project types. Charettes usually take from one to five days, depending on project complexity.

ECO-CHARETTE

Long recognized among architects as a word connoting quick, efficient project development, we have introduced the charette to our clients and fellow project-team members as a carefully orchestrated event to encourage creativity and focus on resource efficiency. The result, we are finding, is a better project, more cohesive design team, and delighted clients.

A well-conducted charette pulls together people with the necessary skills and authority so that far-reaching decisions can be made quickly to save substantial time and money. The final result is an organized plan that helps key decision-makers understand the opportunities and practical implications of a concept for a project.

In the case of the "eco-charette," we focus on sustainable development goals, strategies, and integrated design solutions. It's an intense meeting, a day or more, in which all participants in the project focus on ideas for the efficient use of energy and resources in the new building. The group generates goals and then develops strategies for accomplishing those goals.

By conducting an eco-charette early in the design process, a project team goes a long way toward ensuring the success of a green building. These sessions are rapidly becoming a common element in the design of high-performance buildings and have been used successfully on some of the most progressive buildings in the Nation.

How eco-charettes work

The eco-charette process begins when a new project is launched, sometimes before architects and engineers have been hired. The facilitator interviews the client before the eco-charette to determine their environmental and energy-efficiency goals for the project and the desired outcomes for the work session. It is also common for participants to share in the development of the sustainability goals and objectives during the eco-charette. The facilitator plays a pivotal role in the design of the agenda, selection and layout of the charette's venue, and preparation of the logistics for the group's meeting.

Once the design team for the project has been selected, the entire team - (architect, engineers, contractor, building user representatives, and owner) - meets in the eco-charette for at least a day – (sometimes two or more, depending on the size and complexity of the project) - to devise strategies for attaining the project's goals for sustainability and energy efficiency. Multi-day charettes can also be used to launch and refine the architectural design of a project.

To achieve greatest success in an eco-charette, it should involve everyone who is involved in the design, construction, and operation of the project— often including those who approve or provide the funding and occupant representatives. When people are involved from the outset, they are more likely to feel ownership of, and work for, the success of the project.

About 12 to 30 people is the optimal size for most eco-charettes. You will often find that once the word gets around that the session is being formed, a multitude of curious and interested individuals will want to take part. So you sometimes have to be judicious in selecting who should participate. Moreover, with the more intensive eco-charettes necessary for large and complex projects, a variety of breakout sessions during the two or three-day event will enable more depth of focus on the issues.

In addition to crafting environmental design goals, objectives, and tactical plans, the eco-charette is an excellent opportunity to conduct a preliminary LEED assessment or scorecard. (LEED is a green building certification program of the U.S. Green Building Council. For more information go to www.usgbc.org. In the period of two hours, it is possible to review the entire 69 LEED points with the entire design team and owner to determine which level of LEED certification is appropriate to serve as a goal for the project. This serves as a good basis from which to discuss design and construction cost implications for the project.

The eco-charette is also a dynamic environment for the dissemination of information about the design of both the built and natural environment. One outcome of eco-charettes is high-performance buildings. It is for this reason that selected individuals are invited to participate in the charette, even if they are not involved directly in the project; i.e. the CEO of the company, local government representatives, or other clients who are considering the launch of a new building project.

The time spent in the eco-charette is structured for productivity, and considerable change can result. The end result is to collectively create profound sustainable development goals, establish measurable objectives, and outline the process for achieving the objectives and goals. The eco-charette enables a group of people with a myriad of specialized knowledge to discover solutions while creating ownership and consensus. For a high performing "green" building project, this is a formula for success.

It is of course possible to include an eco-charette component in a Design Charette.

THE NEIGHBORHOOD CHARETTE

I know of no safe depository of the ultimate powers of the society but the people themselves: and if we think them not enlightened enough to exercise their control with a wholesome discretion, the remedy is not to take it from them, but to inform their discretion.
 Thomas Jefferson, 1820

The vitality of our neighborhoods depends upon an informed and involved citizenry. Although all citizens are consumers of community planning and design, they are generally uninformed about the choices available to them or how to go about getting more for their effort. A charette workshop provides local officials and concerned citizens with a set of resources and a process that will help educate and involve the community in the decision-making process.

The charette (a Beaux Arts-derived term for a short, intensive design or planning activity) workshop is designed to stimulate ideas and involve the public in the community planning/design process. It is a valuable tool for laying the foundation for the development of a more formal plan (i.e. comprehensive plan, master plan, strategic plan, etc.). It is most effective as a component of the formal planning and design process.

The charette can be used in a multitude of applications. The charette workshop applications include, but are not limited to:

- s.w.o.t. identification
- quality of life assessment
- issue identification
- needs assessment
- project development and identification
- strategic planning
- energize the community
- consensus building
- visioning and visualizing
- communication and network enhancing

The charette workshop establishes a platform for a free flow of information and opinion sharing. Its primary role is to provide a forum for building community consensus on a vision for the neighborhood's future through active involvement and visualization - bringing the vision to life.

S.W.O.T.

Strengths, Weaknesses, Opportunities & Threats

A.L.P.O.

Assets, Liabilities, Potentials & Opportunities

S.W.I.N.E.

Strengths, Weaknesses, Issues, Needs & Expectations

Where there is no vision, the people perish

Proverbs 28:18

The foundation of Design Charettes

Through working with numerous communities and planning professionals the following list and description of "core" planning concepts has been developed. These ideas are the basis for and essence of the charette workshop process, thus making this planning tool successful. The foundation is as follows:

1. **Citizen Participation:** All segments and groups within the community should be represented throughout the process. Citizen participation should be solicited from all age group, organizations, city/town officials, interest groups, and from the general citizenry.
2. **Empathize with Participants:** Strive to fully understand the problems, perceived problems, issues, and concerns of each participant. Do not anticipate or predetermine the problems in a community and pass judgment. Also, seek out the recommendations, ideas, and list of assets from people throughout the community.
3. **Understand the Community:** Complete a thorough inventory and assessment of the physical, social and economic aspects of the community. There is never too much information. Maps, photos (historic and current), demographics, and other community data serve as a basis for decision making. It is important that the information includes more than just the neighborhood -- context is critical.
4. **Develop User/Reader Friendly Documents:** Make absolutely sure final documents and the lay person can understand supplemental reports. Go to whatever means necessary to make these reports easy to understand and follow.
5. **Get It Started:** A plan is not the final step in the process, rather it is the beginning of the journey. Don't allow a plan to be "shelved" and left to collect dust. Implementation is where the majority of plans fail. A group or individual must provide leadership for each project following the adoption or approval of the plan to insure completion.
6. **Visualization & Visioning:** Developing drawings and pictures is one of the best tools for depicting accurately what is intended or expected. Words alone generate a different mental image for each person who reads them. Pictures generate a platform which is rarely misunderstood and that can be discussed by individual component.
7. **Follow Through & Benchmarking:** At a specified time following the completion of a planning project the plan must be revisited to determine whether or not the projects are on track. This follow through will also be an opportunity to check the progress-to-date and compare benchmark dates.

If you don't know where you're going your might end up someplace else.

Casey Stengel

What a charette will accomplish

Before deciding to begin a charette, the neighborhood should first realize what this unique planning process will ultimately accomplish. A charette will:

- generate strong citizen participation and motivation towards planning and community development projects;
- enhance communication within the neighborhood and increase awareness;
- bring community groups, leaders and citizens together to generate a common community vision and solve community challenges;
- develop "doable" community development projects based on citizen input;

- identify potential funding sources for neighborhood projects;
- overall, give the community a starting point with specific action steps for successful community development and quality-of-life enhancement

The process and end product

A charette is a three-phase process:

- The first phase, the Pre-Charette, focuses on developing, and working with, a steering committee who will determine the primary focus of the charette and handle the logistics for Phase One and Two. It is suggested that the steering committee work with the charette facilitator to identify a preliminary set of issues to be addressed during the charette.
- The second phase, the Charette Workshop, is generally a two-day, intensive planning and design workshop involving the community in a needs assessment, interviews with community groups, prioritization of issues, development of recommendations, the identification of neighborhood development projects and implementation strategies.
- Phase three, the Post-Charette, consists of the preparation of a final document outlining neighborhood strengths, challenges, recommendations, neighborhood development projects, actions steps and potential funding sources. The third phase also includes preparing and delivering a formal presentation open to all members of the neighborhood and greater community. It is during this phase that the community begins implementation.

The entire charette process usually takes between two and three months to complete. There are several creative financing options available to assist communities with the cost of a charette.

Products of the charette:

In addition to the clarification and prioritization of issues and clearly defining projects, programs and action strategies, a charette workshop will also result in the production of tangible products such as:

- comprehensive, reader-friendly document with graphics
- newspaper tab, camera-ready for publication
- numerous graphics (mounted) illustrating projects and concepts, and
- promotional posters and press releases as necessary

A well-run charette can be a tremendous benefit to the neighborhood and a lot of fun. The following is an outline of the basic steps for running a neighborhood charette workshop:

PRE-CHARETTE ACTIVITIES

Ads invited citizens to “open your mind and say Aaahh!” And they did.

Oregon Visions Project

Issue/problem identification

This is probably the most important step in the process. The neighborhood must first determine that it wants to get involved in this process, and is willing to do something with the results. For any community planning activity to be successful, the plan must actively involve and be supported by the community, not just a few of its leaders. While the charette workshop itself must be a community-wide endeavor, it begins with the efforts of a few dedicated leaders that will establish the foundation.

- define the primary and secondary issues related to the project

- determine the scope of the project
- identify the geographic area of the project

Establish a steering committee

As stated above, this is a community effort. To begin the process, and to see it through to its ultimate fruition, it is usually best to identify a diverse group of local citizens that can serve as the coordinators and facilitators of the process.

- 1) Create a citizen action group representing a broad base of community interests (will vary according to issues) as outlined below.
 - a) Should be between 9 to 15 persons
 - b) Must insure diversity of opinions and ideologies
 - c) Include people actively interested in the issues and their solutions:
 - d) business community
 - e) neighborhood/citizen/homeowner associations
 - f) elected officials
 - g) technical staff
 - h) church/religious organizations
 - i) youth
 - j) service groups
 - k) public/private schools (faculty, staff, students, administration, etc.)
 - l) city and county officials
 - m) senior citizens
 - n) persons from adjoining neighborhoods
- 2) Steering committee responsibilities:
 - a) coordinate charette activities
 - b) establish timeline and meeting schedule
 - c) establish preliminary list of issues/charette focus
 - d) arrange for financial support and manage charette budget
 - e) identify preliminary issues to be addressed during workshop
 - f) assist in workshop facilitation

Charette Participants (team)

The charette team is usually a group of individuals with a broad range of skills and backgrounds. There are advantages and disadvantages to having local and outside team members. Local members bring unique insights to the process while outside members can bring a fresh, and objective, viewpoint to the activities. It is important that the team be assembled for its skills, not just for the interests of the individual members. The team will be primarily responsible for producing the tangible results of the workshop. All interested members of the neighborhood are welcome to participate in the charette as members of the charette team, or in other ways only limited by their imagination.

- 1) Get an appropriate facilitator
 - a) -
 - i) University
 - ii) Professional organization
 - iii) Consultant (Note: it is usually advised that the facilitator not be an elected official due to public perceptions, etc.)
 - (1) must be objective
 - (2) if possible, should be experienced in the charette process
 - (3) must be a good communicator
 - (4) must be trusted by the participants
 - (5) must be comfortable with the subject matter
 - (6) must be comfortable asking and answering difficult questions

- 2) should include people with skills in some or all of the following (will vary with charette focus)
- a) urban/community planning
 - b) architecture
 - c) landscape architecture
 - d) marketing
 - e) civil engineering
 - f) community and economic development

We are confronted by insurmountable opportunities.

Pogo

Ideas for getting kids involved:

- Have elementary students make name tags out of construction paper. Each participant can then select a personalized work of art to write his or her name on and wear during the charette.
- During the charette workshop, have the kids draw pictures of how they think their ideal city/town should look.
- Coordinate a Planner's Day In School program prior to the charette.

Get local kids involved. Spending a few hours with grade school students talking about what they want to see in their neighborhood, and having them draw pictures of what the future might look like can be great fun and will usually get the parents involved as well. Local high school art students or drafting students make good members of the charette team. Get them involved!

Developing community relations and public awareness

The key to making the charette an integral part of a successful community planning and design effort is an informed public. One of the easiest and most effective means of informing and involving the community is through the local media. The very nature of their existence is associated with being involved in the local community and they are usually very eager to help in the process.

- Contact local mass media (newspaper, radio, and television)
- Generate posters/handbills & fliers
- Create press releases
- Write articles supporting the process and illustrating the issues
- Inform service and religious organizations
 - make presentations to groups
 - share information
 - encourage participants
- Develop and architectural scavenger hunt

One way for the neighborhood to "get primed" for the charette is to develop an "architectural scavenger hunt." Take pictures of local building details and publish them in the newspaper. This will begin to involve the community through people trying to identify the building. Prizes can be awarded for the most correct answers.

Assemble support information

An effective process begins with good information. Much of the charette process builds on public input, but a solid base of technical information is critical to having accurate information. Especially useful are existing plans and historic profiles. Essential are good base maps of the study area.

- Identify key players in the community

- Document existing conditions
 - aerial photos
 - maps
 - previous planning documents
 - studies or reports
 - demographics and/or statistical information
 - video/photographs/sketches
 - surveys
 - historical profiles (newspaper files, photos, archives, historical societies, books, etc.)
 - governmental regulations
 - reference materials and examples of related projects

It is strongly suggested that the charette have a strong visualization component. That means that the products of the charette will include an ample amount of pictures and drawings to help illustrate the issues and ideas that arise from the process. To facilitate this, slides and /or prints of the study areas (building facades, open spaces, corridors, etc.) should be taken prior to the actual charette. These snapshots can then be used (traced) as the basis for before/after comparisons. Aerial photographs can also be very helpful in illustrating large-scale and site associated issues.

If you can dream it, you can do it.

Walt Disney

Charette Logistics

The actual charette workshop is the most visible aspect of the process. It is to here that all the activity is focused. If the planning is well executed beforehand the charette itself will often be an example of “organized chaos,” will be a fun and productive opportunity for the community to build and visualize its future.

- Establish dates
 - -consider community activities (don’t conflict with major school, church, sport, and other community activities) - you can’t find a “perfect” date, but every effort should be made to minimize conflicts.
 - avoid holidays
 - workshops will involve day and evening activities
 - weekdays are generally better than weekend sessions
- Establish the location for charette workshops
 - should be large enough to hold a large community meeting
 - space should be flexible
 - facility should have some furniture (tables, chairs)
 - facility should have adequate utility support (electricity, restrooms,
 - kitchen (if possible), climate control, outlets, adequate lighting)
 - facility should be centrally located and easily accessible
 - facility should be politically neutral
- Meals should be arranged for charette team/participants.
 - Note: some will be carried in, some may be off-site. Have local restaurants and/or service groups donate/prepare meals. Local citizens can provide snacks.

- Note: in many neighborhoods a lot of good will and buy in can be gained by inviting the neighborhood to stay for lunch after the morning interview sessions.
- If members of the charette team are from out-of-town, accommodations should be provided. They could stay at local inns/hotels, or stay with community residents - this is preferred as it provides the team with a chance to get to know the local people better. Transportation to and from lodging must be arranged.
 - note: sleeping hours may vary considerably. This must be taken into consideration when arranging accommodations
- Materials and supplies
 - newsprint paper - several large tablets are preferred - these are used for recording ideas
- Note: the sheets can also be easily taped to the walls for discussion
- Note: it is better to use paper rather than chalk or white boards. The individual sheets can be used for archival purposes and are much easier to transport.
 - several broad tipped, bold color markers
 - markers are used for recording ideas onto newsprint paper masking tape or tacks to attach sheets to walls
 - rolls of tracing paper - for quick sketches, overlays, etc.
- Items for formal presentations
 - copy machine (with transparency capabilities)
 - computer/word processor
 - slide projector and screen
 - overhead projector
 - 35 mm camera with Polaroid instant slide film & processor
 - colored markers and/or pencils

When possible, the location should be “ in the heart of it all.” If neighborhood revitalization is a major theme of the charette - a vacant storefront is a great location to drive the point home.

Vision without action is merely a dream. Action without vision is just passing time. Vision with action can change the world. *Joel Barker*

FACILITATOR'S GUIDE

For your information, let me ask you a few questions.

Sam Goldwyn

Responsibilities and attitude

- The best facilitators are positive, energetic, assertive, well organized and respected
- Facilitators stimulate and manage group process and flow of information, but do not manipulate the decision-making process
- The facilitator's primary responsibility is to see that the work gets done- as a leader not as a superior
- The facilitator should maintain the enthusiasm of the group and group process
- The facilitator must ensure that everyone participates
- You are accountable for the success of the group, be open to criticism
- Be organized

The setting

- The best environment is one that is neutral
 - If the issues are politically or emotionally charged, hold the meeting/workshop at a neutral location
 - Have the participants seated around a round table or facing each other in a circle
 - You shouldn't have more than 8 to 10 people in a cell group
 - If the circumstances required a more traditional "classroom" setting, people will typically not sit in the front row. Just prior to the meeting beginning remove the first row of seats. This gesture will usually put the participants at ease.
 - It is generally better to add seats than to have a large number of vacant ones
- Avoid locations that have distractions like small kids and phones
- Make sure the room is at a comfortable temperature and has adequate lighting
- It is important to be able to maintain eye contact with everyone
- Be organized

Running the meeting

- Start on time and end on time - identify expendable items on the agenda in the event that something has to be deleted
- Establish ground rules right up front
- Clearly identify the purpose, issues and products early in the meeting/workshop
- Establish a clear understanding of why the meeting is taking place. It avoids misunderstandings, arguments and wasted time. Include even the emotional events in the summary - if they are ignored they will usually come back to haunt you.
- Introductions: it is important that everyone know who they are working with. If the group is large, have the members of the cell groups identify themselves.
- When possible try to break up cliques. It is better to get a fresh perspective that builds on momentum already started.
- Make sure that everything gets recorded. It is best if the participants write their own ideas, but having assistants will help the process
- Review the agenda: it reinforces the tasks and expected outcomes of the meeting/workshop
- Summarize decisions, actions and responsible parties at the end of the session. Designate a follow-up person.

- Be organized

Never doubt that a small group of committed citizens can change the world; indeed it is the only thing that ever has.

Margaret Mead

Active listening is a vital part of the process:

Key components of the facilitator:

- Acknowledge people for perceptive suggestions. Willingness to work with an adversary - anything. Don't lie or be gushy, just make sure they feel part of the action.
- Empathy - understand any difficulties that participants might have with the process and/or the subject. Describing similar experiences from your experience is often helpful. Don't confuse sympathy with empathy. Acknowledge feelings such as anger, but don't take sides or be judgmental - it is inappropriate for a facilitator.
- Clarify - often in the spontaneity of the moment, important concepts get garbled. Help clarify the ideas, but do so without adding color. Don't add values, assumptions, etc. - even if you're right.
- Closure - it is important to bring each topic to a distinct conclusion before adding a new set of issues to the dialog. It is also important to clarify the action steps and key people responsible for implementation.
- Disagreement and conflict are a necessary and creative part of any meeting/workshop. Through an atmosphere of trust, disagreements can be aired and resolved before they lead to "unconstructive" and bad feelings. Unresolved bad feelings lead to misunderstandings, discourage participation, and often lead to the dissolution of the group process. Five ways that conflict is dealt with include:
 1. Avoidance occurs when one or more parties withdraw from the conflict. While, on the surface, this may make the process run smoother, it often leads to bad feelings and non-participation if the person feels they are being ignored.
 2. Smoothing over helps preserve relationships by placing greatest emphasis on agreement and avoid conflict, but it can also be interpreted as giving in. People who try to smooth things over are often taken advantage of.
 3. Compromise involves the art of bargaining. It is many times the best approach, but it is important to resort to compromise only after all alternatives have been explored.
 4. Forcing occurs when one authoritative position is adopted at the expense of another, often without discussion. While it may lead to a form of closure, it is rarely productive.
 5. Problem solving or consensus building involves a process in which a cooperative feeling works to ward a win-win solution. Both sides needs are identified and confronted through open discussion. While this may seem like an ideal, it is a long process and will often result in one of the other four conflict responses.
- No approach is appropriate for every situation. Through trust building and openness, the facilitator will find his/her greatest challenge in managing these situations.

Tell me, I forget. Show me, I remember. Involve me, I understand.

Chinese Proverb

Ground Rules

- Welcome new comers by summarizing the process and decisions reached. All participants are welcome, but it is important that those that have been involved in the beginning don't feel their promptness and full participation is a wasted effort.
- The process is action oriented. While standing decisions should be resistant to modification, meaningful challenge can be healthy* consensus is always a goal. It is important to understand that consensus does not necessarily mean total agreement, but it does embrace acceptance
- * If consensus cannot be achieved, democracy is usually an effective mechanism of bringing closure to the issue. It is always important to record the minority opinion. The points may be invaluable at a later time
- If you know you are a dominant person, make a concerted effort to encourage input from those less dominant.
- Speak toward achieving consensus rather than in a manner that will win debate points
- When responding to another's ideas, emphasize agreements as well as point out areas of disagreement
- Leave all old disputed prejudices and closed minds at home
- Assume that no one has the entire answer, but rather everyone has part of the answer.

The future belongs to those who believe in the beauty of their dreams.

Eleanor Roosevelt

Sample Schedule for the Charette

The actual schedule must be flexible. Public meeting times should be firm and closely adhered to, but you do not want to miss out on special opportunities or stop creative energy just to keep on schedule. It should also be noted that these "days" do not have to be contiguous. In some cases it is better to have several days between sessions to allow the team and community to "catch its breath" but spreading the process out over too long a period of time will lose momentum and public interest in the process.

Several months prior to the charette:

Hold an organizational meeting with the steering committee and the charette facilitator to set goals and arrange a basic schedule. The steering committee should hold regular meetings to make sure all necessary preparations are being made.

One month prior to the charette:

All plans should be finalized. First press releases should be sent out to area media.

The Charette

Session #1 Steering Committee Meetings/Charette Team Meetings

Goal: to develop a working relationship between the charette team and the steering committee.

Note: this can be held the night before the workshop, at or after dinner; or at a breakfast meeting

- An informal setting makes the information flow easier
- Casual conversation is more effective than formal presentation
- Have the steering committee and charette team introduce themselves (people-to-people style) with a short background statement and interests
- This is a good opportunity for the steering committee to share and explain their issues list with the charette team

Session #2 Context Development -

First Day, morning Community/ Issue Orientation

Goal: to get a first-hand look at the community for the charette team and provide an orientation of the background information

- A walking tour of the area led by members of the historical society, neighborhood leaders, children, planning staff, etc. is an important event for both the charette team and the steering committee
- Have the steering committee summarize its interests
- View any videotapes or slides of the community
- Study maps, aerials, photos, etc.
- Review planning reports and other technical documents

Session #3 From the Horse's Mouth -

First Day, morning Interview and Input Sessions

Goal: to provide the opportunity for diverse citizen and public groups to discuss issues with the Charette Team

1. Divide the study team into small groups to facilitate interaction and effective communication
2. Schedule interview times to help insure that each group will be properly heard
3. Each interview session should run approximately 45 minutes. Multiple groups can be interviewed simultaneously, each with its own facilitator and its own recorder.
4. Questions should inched assets, liabilities, needs, goals, etc.
5. After the interview session, give each participant a strip of colored dots and ask them to "vote" with their dots for the most important issues (each issue identified by the steering committee will have been written on a piece of news print and hung on the wall). They can put all their dots on 1 issue, or distribute them as they see fit. This helps prioritize the issues.

Session #4

First Day, afternoon Team Analysis and Issue Clarification

Goal: to provide an opportunity for the charette team to assimilate and discuss observations and prepare for the public meeting

- This is a critical regrouping of the charette team to brainstorm, share ideas, develop preliminary observations and recommendations and get organized for the evening public session.

Session #5 Open the Doors

First Day, evening: Community Discussion and Feedback

Goal: to summarize Charette Team's initial impressions and provide the community with preliminary assessment and analysis. To obtain broader citizen input and feedback

- Team: summarize input and analysis:
 - Develop SWOT (Strengths, Weaknesses, Opportunities & Threats) list
 - Develop goals and objectives and priorities (dots)
- Community
 - React to charette team's initial impressions
 - Confirm or redirect the focus

Session # 6 Getting It Done: Development of Goals and Objectives/ Recommendations

After preliminary presentation / 2nd day

Goal: to clarify the focus of the workshop and to develop and visualize recommendations

- Team meetings to share ideas, coordinate tasks, and organize into project teams
- Team members work individually, or in small teams to develop their recommendations with supporting drawings and narrative
- The charette team should meet several times to coordinate recommendations and projects
 - During the afternoon session, steering committee members are encouraged to work with the charette team in finalizing their ideas. This helps in developing ownership in the project by the steering committee/community
- Produce final graphics and supportive narrative

Session #7 The Big Show - Presentation of Findings to the Community

Goal: to present charette findings to the community

- Public meeting with graphic and verbal presentation
- Can be reinforced with newspaper “tab”
- Present the challenge of following through with the projects

The vision of things to be done may come a long time before the way of doing them appears clear, but woe to him who distrusts the vision
 Jenkins Lloyd Jones

POST CHARETTE ACTIVITIES

The post charette activities can be broken down into three steps. First, the document and presentation preparation; second, presentation and approval; and third, implementation and benchmarking.

We need to accept change and make it our friend

Robert Theobald

Document and presentation preparation

Following the completion of the charette workshop the charette team should first complete the following items:

- 1) A newspaper “tab”
- 2) A reader/user friendly document
- 3) Formal presentation materials

The newspaper “tab” (a specially printed newspaper insert) should be printed and delivered with the local newspaper to all subscribers and readers. This insert shall include a summary of the findings, ideas, projects and recommendations.

The newspaper tab has several purposes. First to give the general population a chance to learn about what is happening in the community. Second, to further solicit input and information (a planning process is never finished). Third, to interest and encourage people to attend the final presentation. Make sure there is at least a week between the publishing date of the newspaper tab and the final presentation.

The final document should be completed using the information and ideas collected to date. The final document should not be finished until after the final presentation. There will surely be some minor changes following the presentation.

Formal presentation materials should include slides and a handout. Slides of drawings, project concepts, character/design samples and existing conditions are most useful. The handout should summarize the entire project for those who may not have been involved prior to the presentation (the newspaper tab can be used for handout).

It is critical that the final report be:

- Action oriented
- User friendly
- Positive
- Free of jargon
- Highly visual
- In “bulletized” format
- Be explanatory, not just descriptive

Presentation and Approval

The final presentation must be thoroughly advertised and take place in a politically neutral facility which is easy to find. A verbal presentation in conjunction with a slide show is generally the best format.

Following the presentation, ask for questions and comments and have someone to document question and answer and comments. The final document should be modified if necessary according to comments at the final presentation.

Implementation and Benchmarking

Finalizing the charette process is the only part of the overall process. Most plans fail because people do not know how to begin implementing the project and programs. A leader must be found for each project to follow through from start to completion. Without that leader the project has little hope of succeeding. It is often helpful to identify a single person to serve as a coordinator. The Steering Committee can also continue as the coordinating body.

Start with projects that are short-term and highly visible. This type of project will help get the momentum going by making small but noticeable improvements. A common mistake is to first take on a large project to create a big impact. Too often these projects fail because people lose their energy for the project. Non-visible (behind the scenes) projects should also be put off until the momentum gets going. Non-visible projects are rarely recognized by the public, thus are much less rewarding to the contributors.

People will rally around successful projects and efforts. If projects and efforts often fail, so too will recruiting volunteers. Furthermore, successful projects will generate more volunteers who can then be integrated into long-term and non-visible projects.

Benchmarking is the process of establishing measurable goals for the completion of specific projects and tasks. Benchmarking should be used to evaluate a project’s concept and progress. This should be a scheduled event and act as a platform for modifications and an opportunity to celebrate successes.

One method to help assure successful implementation of projects is to hire an intern from a planning program or similar field to “spearhead” and coordinate the projects. This intern position can become a town manager or other local person after a three-month period of time. It is also a good opportunity for a circuit-rider planner, if a full-time or local staff position is not possible.

One of the community's greatest resources are its local citizens. An involved, empowered and focused group of volunteers can be a true catalyst for turning the vision into reality.

Ruby Slippers

The power to tap into the creative resources of your community has always been in your power. Like Dorothy in the Wizard of Oz, you too have a pair of Ruby Slippers to help you find the way. The charette workshop is one of the best tools to build a successful planning and community revitalization process. Whether to enhance a comprehensive plan, strategic plan, or development planning process the charette can be used to help visualize your community's ideas and get local residents, businesses and community leaders involved.

Have fun!

TIPS FOR DESIGN CHARETTE PROCEDURE

The **Charette Procedure** is a group idea generating and prioritizing tool. Its strength is its ability to address several issues at once in a highly interactive group setting. The charette procedure involves several small groups simultaneously discussing parts of the "big picture," then passing their ideas on to the next group for refinement, enlargement, and eventually, prioritization. The charette procedure is especially useful when a group has decided *what* they want to do, but is unsure of all the details involved in *how* to do it.

The technique is effective for:

- Addressing several issues simultaneously
- Encouraging active participation
- Sharing leadership among group members
- Building on ideas generated by others
- Keeping discussion active and interesting

An Illustration of the Charette Procedure:

A community group has decided that they want to build a skateboard park for the area's youth. Their task now is to decide how to implement their plan for a skateboard park. The group decides to address the following issues:

1. Where should the Skateboard Park be located?
2. How should the issue of liability be handled?
3. Where are the funds going to come from to build the park?
4. How are they going to raise the public's interest and acceptance for the project?

To start the Charette Procedure, the group is divided into four smaller groups, one for each of the issues to be addressed. Each small group is assigned one of the issues to discuss. Each small group designates someone to record all the ideas generated. The small groups brainstorm to generate as many ideas as possible. The recorders write all ideas on newsprint. After about 10 minutes, the discussion is stopped and the recorders take the newsprint and move on to the next group. The next group reviews the newsprint items, refines and adds their own. The rotation continues until each group has discussed each of the four issues. The last small group in the rotation priorities the newsprint items. The total group is reconvened. The recorders for each issue report on the priorities set.

Procedure

1. Divide the participants into small groups (5 - 7 people), either by numbering off, or some other method.
2. Ask each group to select a recorder, then provide each group with a discussion topic or question. If there are many small groups, some groups may get the same discussion topic or question; otherwise, each group should get a different topic for discussion.

3. Establish a time limit (8 to 10 minutes) for the groups to generate ideas in response to the topic. The recorder should write all responses on newsprint.
4. The leader gives a two minute warning then calls time at the end of the time period. The recorders take the newsprint responses from their group and rotate to the next group, i.e., the topic goes with the recorder. A suggested rotation order for the recorders (and the topics) is shown below.
5. Once the recorder joins his/her new group, all groups are asked to review the information generated by the previous group and quickly add any other ideas they have.
6. Repeat steps 3 - 5 until each group has had an opportunity to discuss every issue. During the last rotation, each group should prioritize the most significant or important ideas generated on that topic.
7. The total group is reconvened. Each recorder displays the newsprint and summarizes the discussion and priorities generated by the topic.
8. At this point, the total group may want to discuss the small group reports and review priorities and reach consensus.

This information on design charettes describes some of the variety of problems and approaches that may be appropriate for different projects in different communities. It is a proven process for gaining community support and involvement, hearing the needs of the staff, users or owners of a project, and identifying problems and issues before final design is done.

PWA Charette Services

For Government Agencies:

- Create preliminary concept plans for project proposals without RFQ process.
- Pre-funding illustrations to generate public support prior to hiring Architectural team.
- Feasibility concept sketches to obtain proposals and/or preliminary budgeting.
- Public workshop charettes to illustrate community design input.
- Obtain national expertise, while also using local design and engineering firms.

For General Contractor/Developers:

- Generate numerous, creative preliminary development scenarios and alternatives for land development and lot layouts to give to your Civil Engineer.
- Obtain creative, prototype building design ideas to explore further with your Architect.
- Determine alternate construction & design techniques to save costs with same program.
- Use fast illustrations to help create public support for land use approvals and permits.

For Real Estate Professionals:

- Create value in land sale packages by showing potential development concepts.
- Provide project development graphics without full design process and expense.
- Provide quick, custom development scenarios for speculative prospect proposals.
- Graphic assistance for predevelopment marketing prior to funding & permit approvals.

For Real Estate Developers:

- Fast feasibility analysis to determine project scope & costs during short option periods.
- Create fast plans adequate for preliminary financing packages or fundraising interest.
- Use these preliminary plans to create marketing graphics for pre-leasing &/or pre-sales.
- Use concept plans to obtain competitive fee proposals from Engineers & Architects.
- Obtain national expertise, while also using local design and engineering firms.

Associated Charette Participants:

Project requirements could include additional design team members that are independent, nationally recognized experts in cost estimating, engineering, construction, marketing, research, economics and specialized building types, such as courthouses, retail, sports, etc. Team members will be selected from a national database to best help your project.

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PWA Affiliations

American Institute of Architects

Construction Specifications institute

US Green Building Council

LEED Certified Professionals

Design Leadership Council

Missouri Parks & Recreation Association