Executive Summary

The intent of this report is to provide a deeper understanding of the many facets of the charrette process including the long and tedious process that goes into planning one of the highest quality. Through this report you will find that these charrettes are somewhat expensive to host, but the money and time saved in the long run of the process does, in fact, yield a profit.

This report is not meant to be put into our own words by any means. Most of the information in it is taken verbatim out of the book *Design Charrettes for Sustainable Communities* by Patrick M. Condon. We used this report to understand what goes into the planning of the charrette process, what occurs during charrettes, and the expected outcomes of them. When we began this report we were in need of developing a “visioning charrette”, but unfortunately this book focuses a majority of its attention on “implementation charrette” planning. Fortunately, I was able to dissect valuable information from the book that can be applied to a “visioning charrette”.

At the time that this report is being completed, we are unable to host a charrette due to funding deficiencies, but should one-day the proper funding be available, this report will be a great resource to guide those efforts.

This report can be read as a whole, or taken in sections; whatever you (the reader) finds most valuable. Also, feel free to alter this report specific to your needs, but be sure to always leave a copy of this intact for any future readers.

The overall goal of this is eventually to get a Living Building on the Western Michigan University campus, but the proper next step will be developing a high caliber “visioning charrette” in order to produce our goals, ideas and purpose for the building.

In the future, should this process continue and you are in need of help, please feel free to reach out to us. We want to see the hard work that has been put in to this project result in the achievement of our ultimate goal.

Sincerely,

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Purpose

**Guide** | This packet is designed to be a guideline to assist the team at Western Michigan University’s Office for Sustainability in the pursuit of obtaining a *Living Building* on our campus. The steps listed can be taken in chronological order, or as information to assist during the construction in future charrettes.

**The Next Step** | Charrettes generally come in the very early developmental phases of design and they serve to some capacity as a “brainstorming” session. We are currently in the early stages of our process and in order to reach the next step we must take our time in completing the charrette phase with the highest of quality. Remember, this is a slow and tedious process, but one that is necessary if you are looking to create something with meaning and purpose.

**Our Goal** | Our overall goal for the *Living Building* project is to obtain a *Living Building* on our campus. The design charrette’s goals is to understand, at a deep level, what the best possible purpose for the building can be, how we reflect our values in a building, and much more.

**Origin of Charrette**

The French word, "charrette" means "cart" and is often used to describe the final, intense work effort expended by art and architecture students to meet a project deadline. This use of the term is said to originate from the École des Beaux Arts in Paris during the 19th century, where proctors circulated a cart, or “charrette”, to collect final drawings while students frantically put finishing touches on their work. (National Charrette Institute)

**Terms to Understand**

**Charrette** | A time-limited, multiparty design event organized to generate a collaboratively produced plan for a sustainable community.

**Sustainability** | Development that meets the needs of the present without compromising the ability of future generations to meet their needs (Brundtland Report, 1987)

**Overview**

| Part I | The Theory |
| Part II | Two Kinds of Charrettes |
| Part III | The Design Brief |
| Part IV | The Nine Rules for a Good Charrette |
| Part V | The Workshops |
| Part VI | The Charrette |
| Part VII | After the Charrette |
Part I | The Theory

Any method for creating and implementing sustainable practice must accept all relevant variable from all three realms:

| Social | Economical | Environmental |

“Since sustainability problems are, by definition, the manifestation of how social, ecological, and economic variables interact, the method used to solve sustainability problems must acknowledge and manipulate these interactions with the intention of producing a more sustainable city.” p. 12

Charrettes address divergent sustainability problems |
- Must evaluate contradictions existing and confronting the drive toward sustainability
- Create an atmosphere where contradictions can be resolved
- Produce a location design that embodies the vision

The Right Stakeholders | Every identifiable person who has a stake in making the city or community a better place for current and future generations must participate in the design charrettes, regardless of the position or views

Building a Team | Participants must spend a sufficient amount of time together in order to become a “team”. Researchers indicate that high-level trust and commitment can motivate team members to work together

Deadline | A fixed and commonly recognized deadline will help the group choose solutions – solutions that are selected in an atmosphere of consensus rather than “proof”

Drawings, Not Plans | The product of the design charrettes need to be a vision for a space, not plans for an area (e.g. ground-level perspectives, aerial views, and highly detailed illustrative plans are the minimum requirements for sustainable community design charrettes)

Everyone is Welcome | When accessible to all, the charrette ensures that all possible issues are clear for the community to understand
### Part II | Two Kinds of Charrettes

#### Visioning Charrette | Speculative explorations of a possible future not directly tied to a government-regulated development or redevelopment proposal

#### Implementation Charrette | Conducted when there is a need for an implementable plan and associated regulatory documents

<table>
<thead>
<tr>
<th><strong>Visioning</strong></th>
<th><strong>Implementation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product</strong></td>
<td>Series of compelling but speculative drawings for a real site, along with attendant text descriptions</td>
</tr>
<tr>
<td><strong>Who is at the Table?</strong></td>
<td>Design professionals and non-professional stakeholders (professionals must be able to draw)</td>
</tr>
<tr>
<td><strong>How long should they last?</strong></td>
<td>Approximately one (1) week &amp; three (3) phases: <strong>Talk</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Doodle</strong></td>
</tr>
</tbody>
</table>

**Talk** | It takes days to establish empathy, so don’t rush right into drawing or doodling. A majority of the time is spent simply talking. Talk time builds trust and understanding in the team.

**Doodle** | Once empathy has been established, move to the doodle phase. This is where ideas become sketches and are formed on paper. Our goal is to have all of the “doodles” on the floor or in the trash by the end of the charrette.

**Draw** | This is when all of the sketches and “doodles” become final drawings, drawn by the professional.

**The Value**

1. They Make Words Real
2. They Create a Common Language of Solutions
3. They are a No-Risk Process
4. They Reveal Policy Contradictions
5. They are Inexpensive

1. They Get Us Past the “Window of No”
2. They are Powerfully Integrative
3. They are Fast and Efficient
4. They are Inexpensive

*Design Charrettes for Sustainable Communities: p. 17-34*
The Design Brief | A set of instructions given to the design team that provides specific numerical requirements and performance targets for the site. It also:

- Translates abstract sustainable development policy goals into firm design requirements
- Provides a way for a broad range of stakeholders to participate in the charrette
- Provides firm “rules of play” that participants in the charrette must respect

The Four (4) Parts |
Goals & Objectives | Design Principles | Numerical Requirements | Performance Targets

The Goals and Objectives | All charrettes have goals. Make sure to set clearly stated goals for the charrette and review them at the end of the process. The goals almost always change to some extent during the final review.

Rules for a Good Goal |
- Goals should be one (1) sentence in length
- Good goals will state that you will produce certain outcomes using certain processes
- Resist the temptation to have more than one goal
- The goal should be such that each of the objectives that follow feel connected to it

The Objectives | Set a clear path of objectives that will aide in reaching the final goal. Make sure this path is clear and agreed upon by your entire team; the more opinions, the better. You want to make sure you have not overlooked any important steps.

Rules for a Good Objective |
- Each objective should be directly linked to other policy demands and referenced as such in the text
- Each individual objective should focus on only one issue
- Each objective should be one sentence long
- The objectives should not be repetitive
- No Key issues should be left out
- The objectives should describe general requirements, not specify numbers
- The objectives should have formal implications for design

NOTE: The book suggests that If we can’t find it in the policies, it’s not in the design brief. For our project, we know the policies will need to be changed, so we will act as if there are no policies in place for the beginning stages and then face them as we move forward.

Organizing Objectives by Category | If a charrette has more than twenty objectives, that’s probably too many. Twelve or thirteen is more manageable. When this many objectives arise, it is important to break the objectives into group that all of the stakeholders agree on (The book gives ideas for different ways to break down the objectives, but if a group finds a more logical way then they should pursue it).
Part III | The Design Brief

**Design Principle** | A design principle for sustainable communities is a design response that intelligently integrates solutions for linked problems into one holistic rule – a rule that cuts across issue areas and, indeed, is not confined even to one of the three main dimensions of sustainability: Environmental, Economic, or Social.

**What Should Be Included in the Design Brief** |

| Numerical Requirements (p. 43) | Performance Targets (p. 51) |
| Required Product List (p. 52) | Points of Departure for Design (p. 53) |
| Cheat Sheet (p. 54) | Strategic Targeted Research (p. 55) |
| Appendices (p. 55) |

**Numerical Requirements** | As the term suggests, numerical requirements have numbers tied to them. Numbers almost always direct typical municipal standards – the same standards that produce sprawl: density number that are usually too low, parking standards that are usually too high, and school size standards that are too big or too sprawl.

**Performance Standards** | Public policy that is stated in non-numerical terms. Policy objectives such as “provide affordable housing,” or “ensure that stream habitat is protected” are of a different order and type than numerical requirements; thus they are placed in a separate section.

**Required Products List** | Every design brief package should include an easy-to-use pullout list of required *drawings, calculations, and explicatory text*. To ask for too many products is the worst thing you can do; do this and you can’t be sure what you will get at the end of the charrette.

**Points of Departure for Design** | Sometimes a charrette challenge simply seems too big, even after every effort has been made to simplify it. By giving various sub-teams different points of departure teams can attack the problems from different angles. The challenge is to allow teams to focus on complex and fundamental issues while not losing sight of the whole.

**Cheat Sheet** | An attempt to summarize the whole design brief into one or two pages. It is usually organized in the form of a matrix with the objectives on the left and columns that might identify numerical requirements and performance targets for each objective.

**Strategic Targeted Research** | This crucial research must be on the table and in the face of participants. It is best to take key pieces of research that already synthesize key features. (Discussed more in **Part V | The Workshops**)

**Appendices** | An appendix to the design brief might contain certain information not produced by the charrette organizers; examples include: key demographic background information that justifies housing targets, sample drawings, etc.
Part IV | The Nine Rules for a Good Charrette

The Rules |

1. Design with everyone
2. Start with a blank sheet
3. Build from the policy base
4. Provide just enough information
5. Talk, doodle, draw
6. Charrettes are jazz, not classical
7. Lead without leading
8. Move in, move out, move across
9. The drawing is a contract

Design with Everyone | Public hearings are usually held in a formal hearing room, where consultants present elaborate illustrated plans to skeptical citizens. The ultimate proposal cannot be expected to inspire support when the process that led to its creation so artfully frustrates any possibility of design integrity. The solution? Design with everyone and most individuals have enough intuition and judgment to add value to a well-designed charrette effort.

Start with a Blank Sheet | Everyone realizes for the first time that the paper is blank, both literally and figuratively blank. The blank sheet expresses both possibility and challenge. Starting at this stage begins the process of creating the team.

Build from the Policy Base | Charrettes must be firmly grounded in existing policy. Ignoring existing policy renders charrettes academic at best and counterproductive at worst. Policy at the national level is generally compatible with sustainability goals as well. A direct link can and should be made between policy emanating from levels of government and each element of the design brief

Provide Just Enough Information | Information is fuel for your charrette and the development will be influenced by many technical and policy issues. This information should be channeled into three destinations:

1. If information in concise, it should be made part of the design brief.
2. If the information is considered valid but cannot be compressed to fit in the design brief, a technical bulletin can be supplied. Four to six pages is designed to inform rather than slow dialog.
3. All of the information in the “policy pile” is assembled into a charrette library of relevant technical studies and policies.

The key is to provide just enough information and no more. Too much information produces decision paralysis. Too little produces bad proposals.

Participants digest little background information prior to the first day of the charrette and vital information must be separated and made concise enough to be digested during the charrette. Look to the stakeholders who will be more informed about your project to help with policy questions.

This rule is cautionary rather than prescriptive. It merely points out the dangers of providing too much information and too little. Your responsibility as organizer is to reinforce their knowledge with a better understanding, but not slow their progress.

Design Charrettes for Sustainable Communities: p. 56-68
Part IV | The Nine Rules for a Good Charrette

Talk, Doodle, Draw | Your team should first talk about their ideas, move to doodling, and end with their vision in the drawing phase. There is a danger in rushing this process. It takes a certain number of hours or days to unpack the issues embodied in a charrette. It takes time for stakeholders to offer their opinions and get to know one another better.

Talk | The process of transformation form stakeholder, to team member that occurs during the “Talk Phase” can seem unproductive to the more action-oriented member. But rushing into fixed design decisions before this process has unfolded is a mistake. A designer is one who designates using a problem-solving process driven by intuition and judgment; all stakeholders must become designers.

Doodle | Talk must eventually turn into drawings. The step between talk and drawing is the doodle. This is the tool for turning talk (which can be endless) into concrete decisions. Diagrams are loose enough to allow various interpretations while still imposing order.

Anyone can doodle. And stakeholder can start to give form to the site with their own hands because it is crucial that stakeholders contribute directly as authors of the design.

Draw | The draw phase commences only after the stakeholders are sure that the drawings will reflect a previously arrived consensus. Drawings are evidence of consensus.

During the draw phase, the big table with everyone can and should be broken down into separate task-oriented tables. The facilitator’s role becomes the coordinator making sure the designs and products emerging from each sub-table are compatible with all the others.

You should have 3 to 4 “fast hands” at every charrette (people who are not only good designers, but also draw effectively and expressively). Produce a few very clear and professional-quality drawings to explain the overall design idea along with other drawings that are less well rendered but sell the idea.

Charrettes are Like Jazz, Not Classical | Jazz is much like design; it works with ambiguity and is not searching for perfection, but rather for something fresh and unpredictable. Like Jazz, design charrettes are propelled by inherent skill, intuition, and judgment.

They are rather a creative chaos – a process that seems random at first but eventually organizes itself into a beautiful pattern The fractal patterns in charrettes results from the interplay between a set of fixed rules related to opportunities for variation and creativity.

Lead without Leading | Leading without leading in charrettes is about silence. When all members of the design team are fully engaged and collaborating, the leader or facilitator leads by remaining silent. They let the process take its course, but remain watchful for signs of disturbance.
Part IV | The Nine Rules for a Good Charrette

Watch For |
- Signs of Disturbance | Too much time on a single issue
- Stakeholders left out of the conversations and more inclined to become increasingly alienated from the process
- Over aggressive and dominating presence in group making dialogue impossible
- A process that veers away from the objectives set earlier by the group

Leading without leading also means asking the right questions |
- How a certain action supports the objectives of the group
- How the group thinks they are doing and how confident it is that it can reach consensus on all key issues

All of this listening and questioning is a quiet activity characterized by much more listening than talking and all in a calm manner. Also, there will be times when the group will slow to a halt, dragged down by the complexity of the challenge or even simple fatigue. This is when the leader must speak softly in order to reignite conversation and break the silence. The more subtle and artful this leadership, the less likely the group will be aware of it.

Move In, Move Out, Move Across | This rule summarizes a solution to an unavoidable problem: Any charrette worth the effort will open up questions at many scales and across many issues. The charrette organizers can divide up the team to deal with these different issues and scales. Unfortunately, this is a recipe for disintegration design.

There is no way to completely eliminate the inevitable tension between the part and the whole, but it can be made a creative tension by:
- Moving In | to small scale issues
- Moving Out | to large scale issues
- Moving Across | from one issue to another

This is accomplished by starting with an initial meeting with everyone to discuss the charrette program and if followed by a breakout session with subcommittee teams who focus on the projects key topics. After some time, subcommittees report back together with their findings and provide feedback. Facilitators must bring to light point of connections and conflict between issue areas. These points of conflict will eventually bring compelling and holistic design solutions to the team, and should be identified as important charrette design challenges.

The Drawing is a Contract | The purpose of drawings is to embody the agreement arrived by the charrette team. These drawings are like contracts but in pictures rather than words. With these pictures it is less important to fully resolve all design issues than it is to be sure the drawing represents the team’s goals. When drawing as a contract, they are not breakable without the consent of the group and you should make this clear and understandable between the project sponsors and charrette organizers.

These nine rules collectively constitute both a methodology and an ethic for the charrette. Remembering all and adhering to them as closely as possible makes the complicated task of running a charrette manageable. They apply mostly to the charrette itself, but influence the workshops that precedes.
Part V | The Workshop

Pre-Charrette Workshop | Long, multi-participant meetings with some product outcome such as a design program or design brief for a site.

Workshops are crucial for Implementation Charrette, but are less critical for Visioning Charrettes. The design brief should be reviewed by an advisory committee made up of community representatives as well as business and political leaders.

The Workshops |
Principles | Goals and Objectives | Numerical Requirements | Performance Targets

Main Functions of Workshops |
• Review, amend, and adopt the design brief for the charrette
• Begin the crucial social transformation of a group of separate stakeholders into a workable and working team members

Choosing Participants | Think of is as a way to assemble the actors who would ordinarily be in a position to influence the project in such a way that they can work together toward a more favorable outcome. Stakeholders typically fall into the following categories:

| Public Safety Officials | School District Officials | Elected Officials |
| Transportation Authority | Environmental Regulators | Cultural Groups |
| Housing Developers | Elderly or Impaired Reps | Recreation Groups |
| Economic Development Officers | Land and Property Owners | Merchants from the area |
| Nongovernmental Organizations | Municipal Planners |

30 to 60 participants is more than the norm

Workshop 1 | Principles Workshop
The principles workshop should be two to three hours longs and has two (2) basic parts, the presentation and roundtable discussions.

The Presentation | The presentation should last up to one (1) hour in length and should be presented by someone who is dynamic, engaging and knows the issues in depth. The most important thing in a speaker is that he or she knows how the separate issues are connected. Most of the people attending have not had a chance to think about the issues and how they are connected to one another.

After the presentation there should be a question and answer period that encourages conversation and opinions from the stakeholders. This Q & A period can last as long as 20 to 30 minutes and should be followed by a break.
Part V | The Workshop

**The Roundtable** | This should include six (6) to ten (10) people, a designated recorder and one design facilitator. The purpose of the discussions are to review the written draft principles and revise them as necessary. A good way to do it is to break out into tables that are stakeholder based. Be cautious though that this does not produce too much narrow thinking. It might be a wise idea to place a person with different perspectives at these tables to maintain balance.

This stage also allows stakeholder to get to know one another better in a lower-risk context than later workshops or the charrette itself. The project facilitators can use this workshop to gain the measure of the group and begin to understand who are the creative movers and who are the more conservative thinkers.

The product of this first workshop is an approved set of principles, and with more than one table working on the same set of principles you will get more than one result for each set of principles. It is the duty of the facilitators to guide the group to create a consensus on one final statement.

**Workshop 2 | Goals and Objectives Workshop**

The purpose of this workshop is to validate the site-specific goal and objectives before taking up the more directive numerical requirements and performance targets at the workshop that follows. The workshop should last approximately three (3) to four (4) hours.

**The Presentation** | Goals and objectives are not drafted at the workshop, but rather presented to the stakeholders as a carefully researched and footnoted draft. The footnotes should like the objectives to the policy documents that support them.

This presentation will begin the goals and objectives workshop and is to be kept under 30 minutes. This presentation will be used to read through the objectives; again, a dynamic speaker is required for this presentation.

**The Roundtable** | The bulk of the goals and objectives workshop is devoted to roundtable conversations of six (6) to ten (10) persons, and a recorder, with each table managed by a design facilitator. Each table is asked to review and suggest revisions to the draft goal and objectives.

During this discussion, the tables will be asked to elect one or two of their members to represent them at the charrette. They need time to take measure of the man or woman who might represent them.

The time allotted for this discussion should be broken into three equal parts

<table>
<thead>
<tr>
<th>Goals</th>
<th>First Half of Objectives</th>
<th>Second Half of Objectives</th>
</tr>
</thead>
</table>

There are also **two reporting sessions**

<table>
<thead>
<tr>
<th>Goal Statement</th>
<th>Objectives</th>
</tr>
</thead>
</table>

Design Charrettes for Sustainable Communities: p. 69-80
Stakeholders have to cover more ground and have less opportunity or occasion to philosophize during the goal and objectives workshop. Also, facilitators must methodically and enthusiastically make progress toward consensus.

Occasionally there will be two or more ideas for a change that cannot, because of their complexity, all be easily integrated into the statement. In such case, the facilitator must ask permission from the group to take their input under advisement for further reflection after the session.

At the workshop stakeholders are still getting to know one another, so it is important to take many breaks, allowing for discussion and to keep the stakeholder fresh. The goal and objectives workshop is fundamental to the charrette process and cannot be eliminated for any reason.

Workshop 3 | Numerical Requirements and Performance Targets Workshop

This workshop’s goal is to specify the tasks to be accomplished at the charrette. They grow directly out of the objectives, are supported by research, and do not contradict the imperatives in the policy base. The workshop will last approximately 4 hours.

The Presentation | This presentation is much different from the past presentations. Instead of one presenter for the entire group, the facilitators at each table present a draft numerical requirements and performance targets document to the group. Everything included in the requirements and targets draft must be tied back to the goal and objectives, as well as to the research and policy base that validates them.

Do not go through the entire packet, one-by-one. Instead, presenting an overview of the central themes and the most important requirements in the draft will help get the day rolling. Orientation to these materials should be confined to less than 45 minutes, with the bulk of the time used for roundtable discussion.

The Roundtable | Just as in the previous workshop, the bulk of the goals and objectives workshop is devoted to roundtable conversations of six (6) to ten (10) persons, and a recorder, with each table managed by a design facilitator. Unlike the other workshops, it is advisable to divide the tasks of reviewing the draft among the different tables, and when each table has satisfactorily completed “its own area,” it moves on to the other issues. Be aware of narrowing thinking with these groups. The objective for each table is to review, amend, and endorse the numerical requirements and performance targets of the design brief.

This workshop is intense for both facilitators and stakeholders. It should be broken up with three breaks of at least 20 minutes. This means that there will be four discussions sessions: two (2) on numerical requirements | two (2) on performance targets.

It is unlikely that this workshop will generate a final approved design brief with every word endorsed – there will be too many different tables proposing too many different changes to the same items. The facilitators must again ask the stakeholders to allow them to amend the draft immediately after the workshop.
Good facilitation at this last workshop is crucial. The facilitators must gently keep the stakeholders focused, elicit comments from the more reserved, limit the talk time of the more verbose, actively search for areas of consensus in the white noise of apparent disagreement, and be sure that the clock remains your friend.

By this session, the stakeholders will know the others at their table very well. At the end of the workshop, each table must elect or choose delegates to represent them at the charrette if the total number of stakeholder participants is more than twenty. In other words, stakeholders from this larger group, sometimes called the “outer table,” must select stakeholders to represent them at the collaborative design charrette table, called the “inner table”.

The numerical requirements and performance targets workshop cannot be eliminated for obvious reasons. It is impossible to conduct a meaningful charrette without a carefully drafted design brief, and the requirements and targets section is the heart of the design brief.
Part VI | The Charrette

Planning the Charrette | Typical charrettes will last between 3 and 8 days, with most lasting closer to 4 days. If the principles, goal, objectives, numerical requirements, and performance targets generated in the pre-charrette workshops are robust, and if all participants are committed to them, the charrette process described below should unfold smoothly in the time allowed. The workshops are designed to resolve potentially divisive issues ahead of time.

Inner & Outer Table |
Inner Table: Smaller group of individuals who will participate in the charrette itself, drawn from the members of the outer table.
Outer Table: All individuals who participated in the pre-charrette workshops

Visioning charrettes don’t need an outer table because the participants are largely designers working to a brief produced by others.

Basic Resources Needed for a Charrette |
Space | The most logical space for most charrettes is a hotel conference room. This is because it meets all of the requirements set for a conducting a charrette:
- Flexible Spaces
- Windows (Necessary)
- Wireless Internet
- Catering Services
- Lodging (for visitors)
- Storage space
- Additional Meeting Rooms
- Any Additional Requirements You Find Necessary May be Added

Materials | Essential Materials Include
- Tracing Paper
- Charrette Box Kits
  - Thinnest of Black Pens
  - Pencils
  - Colored Markers
  - Colored Pencils
  - Whiteout
- Scales, triangles, and parallel rules
- Computer (Minimum one computer per 5 participants)
- Design facilitators bring their favorite drawing tools

Staffing | Trained staff are needed to manage, facilitate, support and record the workshops and charrette. A staff-to-participant ratio of about 1:6 should be the target, and design facilitators should be drawn from the design and planning professions.

The Opening Event | The typical charrette begins with a kickoff event, usually open to a wide range of invited stakeholders and other interested parties. The “outer table” stakeholders from the pre-charrette workshops would most certainly be invited, as would any of their colleagues who could not participate in those workshops with them.
There are two (2) parts to the opening event:
Part VI | The Charrette

Project Presentation | The first presentation is given by the charrette staff or possibly by key staff from sponsoring agencies. The purpose of the presentation is to present the project, the problem and the site to all in attendance. In total, the presentation should be 20 to 30 minutes in length.

Individual Presentations | These presentations should be given by stakeholders, each of whom present their own personal take on the problem. A typical lineup would include the mayor of the host city, the head of the development community, the head of local stream stewardship committee, the head of the regional transit authority, and three (3) or four (4) others, each of whom would ideally talk for five (5) minutes.

The Site Tour | The site tour is an important part of every charrette. The speakers from the opening event will also speak during the site tour. Thus they can reiterate and demonstrate the points made in their earlier talk. The bus should roll to a half at three to six key locations for 15-minute walk and talks.

The tour should consume one and a half to two hours, depending on the site and its complexity. Ideally, both the opening event and the bus tour would occur in the morning of the first day of the charrette, allowing participants to return to the charrette site in time for lunch.

A portion of the lunch hour can be devoted to a question and answer sessions. This way, if technical experts have been brought in from outside the region, they might use this time to demonstrate successful solutions for similar problems.

The First Design Stage: Talk | Step One: Surrounding the Big Map
The first “design session” will be dominated by talk. It is here that the group confronts the “blank sheet” of the site. A large piece of transparent tracing paper might be rolled over the base map to make it less threatening for stakeholders to mark it – not with design solutions at this point, but at locations that in their view must be addressed.

Facilitators must also ask participants how much they want to depart from status quo development patterns. In my experience, most stakeholders opt to depart from them quite markedly – which is surprising in light of the fact that most of them are typically in the business of replicating status quo development patterns everyday. Also, this might be the best time to discuss local or distant precedents that may be relevant.

Step Two: Breakout Tables
After an hour or two at the big table, when the issues have been unpacked, everyone’s opinions voiced, and precedents assessed; it’s time to move on. Moving to smaller breakout table gives participants the opportunity to explore general topics such as movement systems for cars, transit, and pedestrians; community systems for housing, jobs, and community services; green infrastructure systems for streams, riparian zones, storm drainage, parks, and boulevards; and energy systems for buildings and districts.

Step Three: Bringing the Big Table Back
The table of the whole is reconvened after no more than an hour and a half. Each breakout table reports on its conclusions to the larger group and then entertains questions. Make sure everyone, especially the facilitators, watch for contradictions.
The Second Design Stage: Talk to Doodle | The second day begins early, but we let people talk for a while before starting. The participants are usually jazzed up with ideas after their nocturnal reflections on the first day, and are anxious to share ideas. The meeting eventually begins at the table of the whole. At this point, the lack of obvious progress might cause some anxiety, but the charrette organizers can allay those concerns.

The group breaks into smaller groups again—but this time the tables focus on different areas of the site, not on different general issues. Having teams work on specific technical issues such as building reuse opportunities, downtown revitalization strategies, parking questions, or green street sections.

By now it is appropriate to put marks that symbolize tentative proposals on the blank sheet. Expert facilitation by skilled designers is required. Design facilitation is different from dialogue facilitation. It’s done with talk and pencil:

“We could do this or we could do that” (facilitator draws"
“It could go here or go there” (marks the page)
“It can be this high or this wide” (quickly generates an axonometric)
“Where do you think it should go?” (hands the pencil to a stakeholder)

At this stage of the charrette, proposing a solution is the worst thing for design facilitators to do, even if a solution appears obvious to them. Doing so now leaves the stakeholders behind and misses the value they bring to the process. The bad feeling engendered among stakeholders when their role is not valued is almost impossible to repair after the fact.

Talking still dominates this stage, but it is done while drawing. Design facilitators can delegate this “fact checker” role to a stakeholder and ask that person to ride herd on the group, ensuring that the group is on track to meet the targets.

Be sure to set time aside at the end of the day for design facilitators to work without the stakeholders. This will give them the time to clean up the work that has been done that day and prepare to start at a good point for the next stage.

The Third Design Stage: Doodle to Draw | By now, stakeholders and facilitators have most often become a working team. Occasionally, there will be some personality conflicts, so be prepared to handle that.

By late in day two or early in day three, the doodles and diagrams provide a sound basis for more concrete proposals. Finally, the largely blank base map can be marked with the first lines of what will become the final proposal.

Eventually doodling gives way to drawing, and group conversations gives way to focused group production. At this point, facilitators should refer to the list of required products in the design brief. Stakeholders, facilitators, and any sub-teams should reflect on how they might complete those products. If the remaining time seems too short to complete the products listed, then facilitators and stakeholders should make a collective assessment of how close they can come and which products are most vital.
Part VI | The Charrette

**The Midcourse Correction** | It is a good idea to hold a midcourse correction about halfway through this type of charrette, usually at the end of day two or at the beginning of day three. We invite all of the participants in the pre-charrette workshops (the outer table), private sector leaders, and certain public officials to this meeting. The meeting is a very informal “pinup review,” a chance to hold up preliminary ideas for review before it’s too late to change them.

The basic question facilitators should ask at these tables is this: “Do you feel comfortable enough with the progress made by the team to support its moving forward?”

**The Fourth Design Stage** | “Draw Like Your Pants Are On Fire” and Final Presentation

By the middle of this stage of the charrette described here, the group is fully into the draw phase. Producing the final drawings and building the final presentation are really the same thing. In the last twenty–four hours, it’s all about production and it’s all about the final show.

**Pre-Presentation Team Meeting** | This meeting helps to clarify the final product requirements and identifies key individuals who will accept responsibility for producing portions of the final presentation. It also helps focus the participants on making final decisions. Time is precious, so this meeting should take a half hour and never exceed an hour.

**Final Presentation** | It is a good idea to plan the final presentation for 7 pm on the last day of the charrette. This is convenient for citizens, ensuring the largest possible crowd. An audience of 200-400 outside observers, shored up with member of the outer table, provides the critical mass necessary to elevate the importance and impact of the charrette. It is a good idea to book a large theater for this size of a crowd, ideally a high school auditorium.

To boost attendance, it is advised that the team uses direct mailing, social media, focused e-mails, the local media, etc. to get the word out and build a buzz amongst the community.

It is usually a mistake for organizers or facilitators to do more than start off the presentation or wrap it up at the end, even though stakeholders often suggest that they take a more substantive role. This is an important time for the stakeholder participants to take ownership of the proposal in front of their peers in the community.

*The final presentation should be no more than 2.5 hours long – ever.* Try to confine the presentation of the proposal itself to an absolute maximum of 60 minutes. Geographic zones, issue areas, or charrette principles break up this proposal presentation, with at least three different stakeholder presenters taking the stage. A discussion featuring a respondents’ panel made up of local luminaries and respected citizens immediately follows the presentation.

Just before bringing the session to a close, the organizers should tell the attendees what the next steps will be. At the very end, the mayor or some other luminary might close the session.
After Party Celebrating | After every charrette, it is a good idea to have a very informal party for many reasons; it adds value to the participants that stuck with the charrette for the past 4+ days, it gives participant an opportunity to informally commit to the project and it also them to celebrate the hard work they have done.

Variations on the Theme | For the sake of convenience and clarity, the above described charrette makes it seem as if there is only one possible version, when in fact this is not true. The framework of these charrettes are altered almost every time. Be as creative as you like when planning your charrette, some things may worked better than described above, and other may not. Putting your own twists on things gives you the opportunity to find what works best for you, and I highly advise doing so.
Part VII | After the Charrette

A charrette is only as good as what happens after it’s over.

More “Mini Charrette” Sessions... Maybe | Additional sessions with the design team and relevant officials might be required to work through difficult issues left unresolved at the main charrette.

Preliminary Charrette Report | The organizers of the charrette should deliver a preliminary report to the project sponsors within a week to ten days after the final presentation. The easiest and most appropriate way to get this message out is to reuse the final presentations PowerPoint as the framework for the preliminary report. A typical report would consist of 25-40 pages based on the charrette presentation and following its exact format, starting with the principles, then describing goals, objectives, numerical requirements, and performance requirements.

Assuming project sponsors have no objections, this report can and should be distributed widely. At a minimum, the report should reach the following people:

- Newspaper Reporters
- Members of the Inner Table
- Audience Stakeholders who participated
- Elected and appointed officials who we exposed to the project

It is also advised to build a separate website for each charrette. This way, people can easily access the report at any time, even interested parties that did not receive a copy of the charrette report.

Using the report as a “leave-behind” is an important way to ensure that council members have this information in an easy-to-digest format – one that they can understand, retain, and explain to others if called upon.

Final Plan | Once the preliminary report is completed and distributed, organizers can turn their attention to the final plan. There are two basic types of final plans: concept plan and implementation plan

Concept Plan | Is a plan that describes the charrette proposal, but in a narrative and didactic form. It is designed to teach and inform rather than to regulate. The concept plan provides a good opportunity to describe process issues and to publish targeted research in an enduring form.

The tone of the text is narrative, didactic, and qualitative, as opposed to the imperative, prescriptive, and empirical tone of an implementation plan (discussed below). Organizers and project sponsors must be clear on the purpose of the concept plan.

For an example of a concept plan, see page 115 of the book.
Part VII | After the Charrette

Implementation Plan | Describes the charrette proposal, but in instrumental and regulatory terms. It is designed to clearly regulate rather than inform or educate. We format implementation plans according to template already in use by the host municipality, respecting the culture of regulation already in place. These plans take more time and money to produce when compared to concept plans.

Overall, design charrettes provide significant savings in time and money when compared with conventional planning processes.

For an example of a concept plan, see page 116 of the book.

Mini-Charrette | Mini-charrettes should last about a half day and bring together all of the charrette participants and any new consultants who now have a role in the project. Technical issues should be unpacked carefully in the presence of city staff and consultants, with all of their anxieties and concerns laid out in great detail. Senior management staff should be involved at the highest level possible, and elected officials may be involved if they were involved in the charrette.

Depending on the issue, the table of the whole at the mini-charrette might be divided into two or more breakout tables for subtasks. As always, the division into breakout tables must be followed by a “reporting session” to ensure that synthesis is not compromised by excessive silo thinking. Agreement is the product of the mini-charrette. That agreement can be in the form of words, memorandum of understanding, or official minutes should be part of the service provided by the organizers.