

TOP TECHNIQUES FOR SUCCESSFUL CHARRETTES



CNU XII: Chicago, IL

NCI
National Charrette Institute

The National Charrette Institute

Who we are:

- The National Charrette Institute is a nonprofit educational institution. We help people build community capacity for collaboration to create healthy community plans.

What we do:

- We teach professionals and community leaders the art and science of Dynamic Planning, a holistic, collaborative planning process that harnesses the talents and energies of all effected parties to create and support a feasible plan.
- We advance the fields of community planning and public involvement through research and publications.

NCI Charrette Planner™ Certification

Introductory Module (one of the following):

- “Introduction to Dynamic Planning” half-day workshop
- NCI Charrette Start Up Kit on CD-ROM

Continuing Module:

- “Continuing Dynamic Planning” 2-day workshop



NCI Resources

- NCI Charrette Planner™ Certification
- On-the-job Training and Coaching
- Technical Assistance
- Visit www.charretteinstitute.org for more information



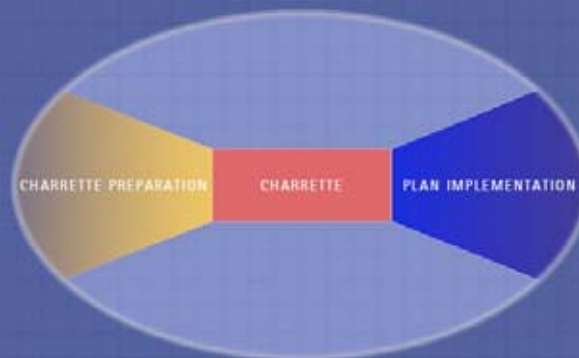


Principles of Dynamic Planning

excerpts from the
NCI Charrette Planner Certification Course

The Dynamic Planning Process

- A three-part process for achieving transformative change in public and private planning efforts
- The overall process in which the charrette is the transformative event



Strengths of Dynamic Planning

- Creates a feasible plan with minimal rework
- Results in the highest quality design
- Mobilizes the collective energy of all interested parties to support the project



What is an NCI Charrette?

- The Charrette is a multi-day collaborative planning event that harnesses the talents and energies of all effected parties to create and support a feasible plan that represents transformative community change



Drawn for The Washington Post, 1988, by Roger K. Lewis, FAIA, Professor, U. Maryland School of Architecture

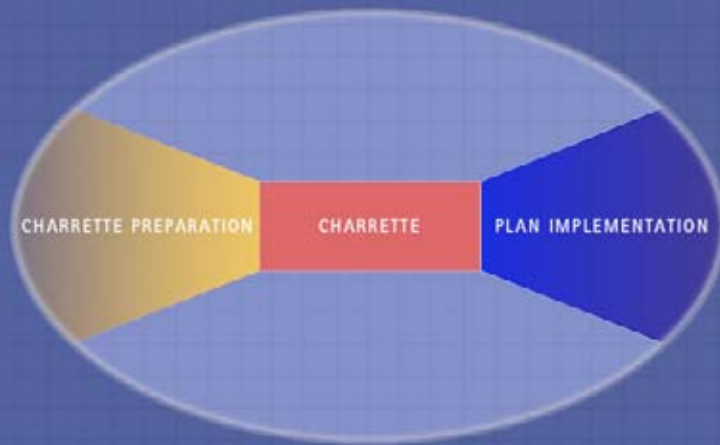
Dynamic Planning and Charrette Strategies

1. Work collaboratively
2. Design cross-functionally
3. Compress work sessions
4. Communicate in short feedback loops
5. Study the details and the whole
6. Confirm progress through measuring outcomes
7. Produce a feasible plan
8. Use design to achieve a shared vision and create holistic solutions
9. Include a multi-day Charrette
10. Hold the Charrette on site

A Sample Dynamic Planning Process with a Charrette



Phase One: Charrette Preparation



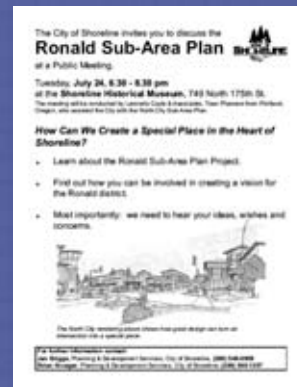
Dynamic Planning Phases



Charrette Preparation: Getting Charrette-Ready

Phase 1: Research, Education and Charrette Preparation

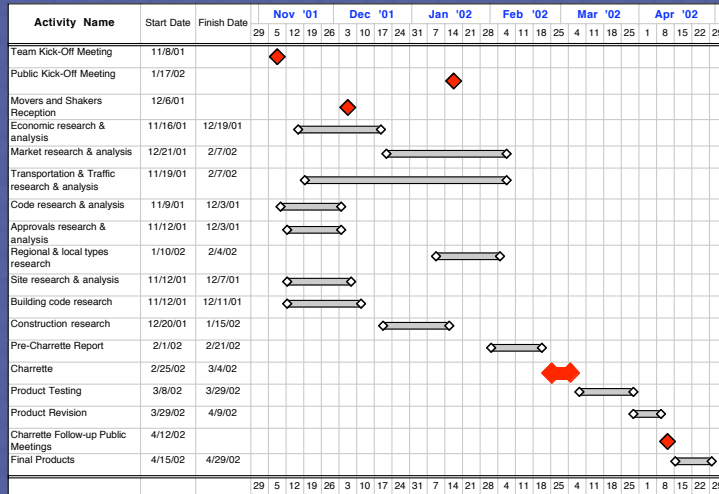
- Project Set-up and Organization
- Stakeholder Involvement Plan
- Base Information
- Feasibility Studies
- Logistics



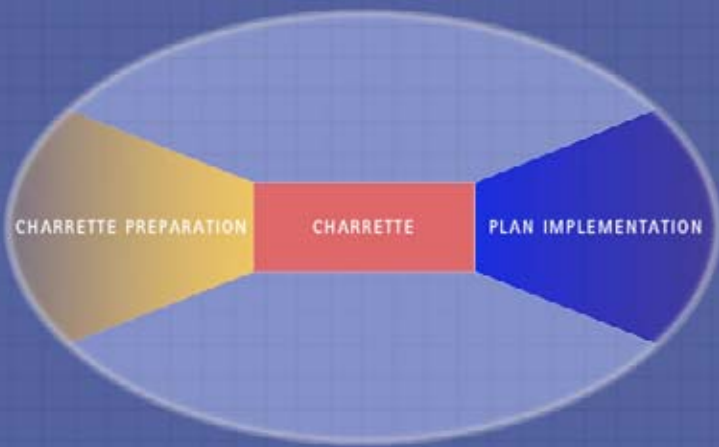
Sample Stakeholder Analysis

Viewpoint	Person	Affiliation	Issues	Win	Outreach Strategy	Charrette Participation
Elected Official	Donna Gerber	Contra Costa County	25 years of controversy, with nothing to show. Gerber is the project "champion"	A plan and codes agreed upon by BART, and the Neighborhood. A bullet-proof public process. A national exemplar project.	Email, phone	Daily Team Meetings
Elected Official	Mark DeSaulnier	Contra Costa County	Concern about project costs. Interested in a non-controversial outcome.	A project that can be approved supported by neighbors.	Email, phone	Public Meetings
Elected Officials	Dan Richard, Joel Keller	BART Directors	Balancing BART operations, goals of increasing ridership	A built development that serves as a model for BART, economically successful for BART	Email, phone	Public Meetings
Neighborhood Activists	Kathy Boswell, Kris Funt, Terry Hemming	Walden District Improvement Association	Deep distrust of County Supervisors and staff. Traffic, visual impacts, property values, safety.	Minimal traffic impacts, maximum housing, low buildings across from neighborhood, pedestrian access, local retail only, no increase in BART parking. The county must keep its promise and build the regional trail.	Emails, letters	Separate Meeting
Neighboring Commercial Owners	Lynette Tanner-Busby	Contra Costa Centre Association	Workers have limited local services	Compatible uses with existing business, amenities for office workers, traffic management	Emails, letters	Separate Meeting
Developer	Mark Ferrar, Bill Mohr	Millennium Partners Catalyst	Last development proposal failed.	Economic and market feasible plan.	Email, phone	Daily Team Meetings And reviews

Charrette Ready Plan Schedule



Phase Two: The Charrette



During the Charrette: Charrette Roles and Process

Charrette Design Team

- The Charrette Design Team works uninterrupted to produce the plan



During the Charrette: Charrette Roles and Process

The Stakeholder's Role

- The stakeholders provide vision, input and review at key moments during scheduled, as well as impromptu, meetings



Stakeholder meeting
(Scheduled)

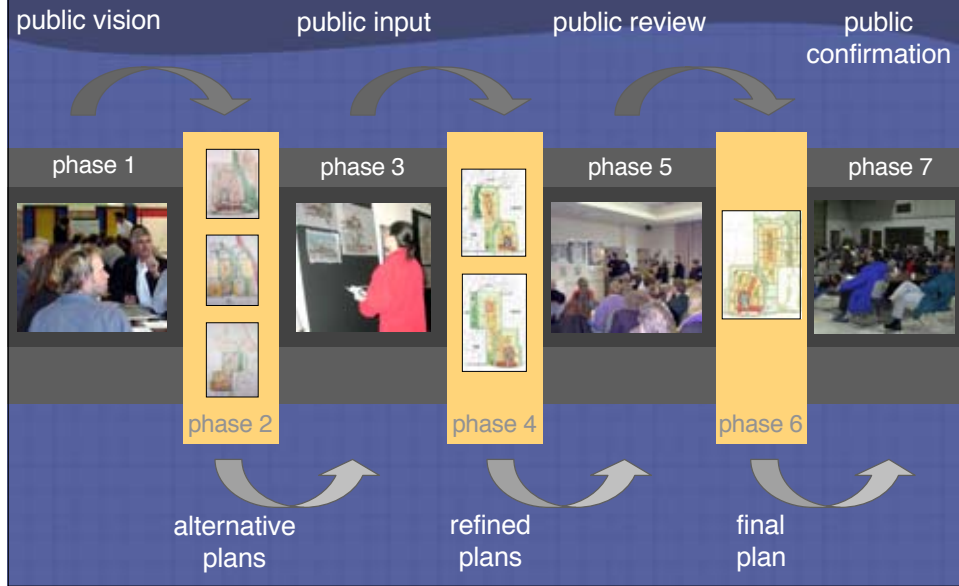


Public meetings
(Scheduled)



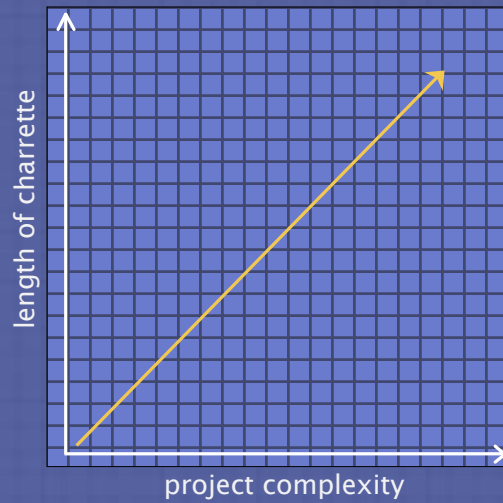
Drop by the studio
(Unscheduled)

Charrette Work Cycles



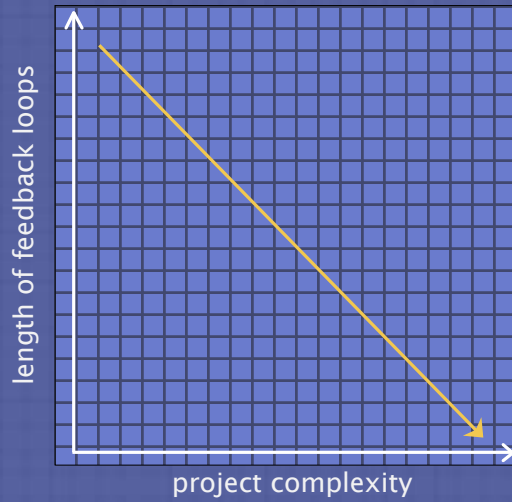
Charrette Scheduling

- The more difficult project, the longer the Charrette



Charrette Scheduling

- The more difficult the project, the shorter the feedback loops



Sample 7 Day Charrette Schedule: For complex projects

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
8:00 AM	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast
9:00	Studio Set Up	Team Meeting	Team Meeting	Team Meeting	Team Meeting	Team Meeting	Team Meeting
10:00	Tours	Alternative Concept Development	Alternative Concept Refinement	Concept Synthesis	Design Dev.	Stakeholder Testing	Prod.
11:00	Stakeholder Meetings					Stakeholder Testing	Production
12:00							
1:00PM	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
2:00	Key Stakeholder Meetings	Alt. Concept Dev.	Stakeholder Mtgs.	Alt. Concept Refine	Stakeholder Review	Concept Synthesis	Stakeholder Testing
3:00						Design Refinement	
4:00	Meeting Preparation					Optional Open House	Production
5:00			Meeting Preparation				Meeting Preparation
6:00	Dinner	Dinner	Dinner			Dinner	Dinner
7:00				Open House			
8:00	Public Meeting	Alternative Concept Development/Team Review	Public Meeting		Design Refinement	Production	Final Public Meeting
9:00				Design Development			
10:00					Production		
11:00							
12:00							

4 - 6 weeks max.

Charrette begins with input session, then design begins

Review & Revise

Final Review

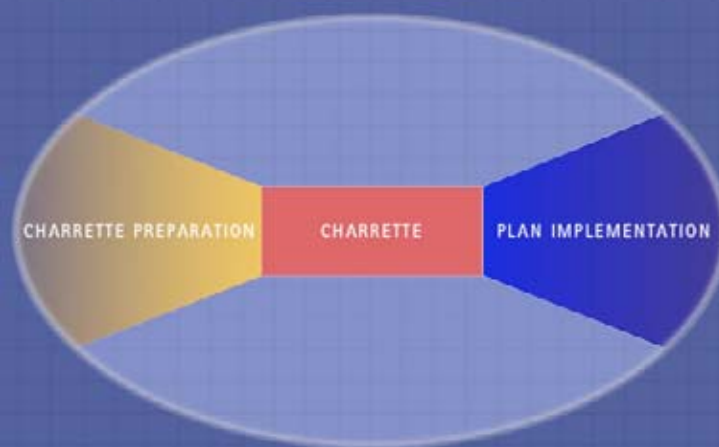
Final Charrette Products

Public presentation by team members

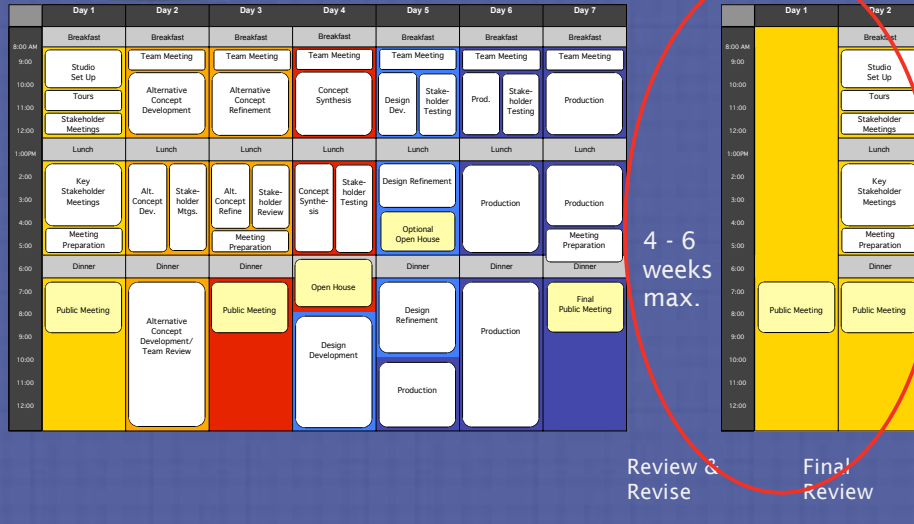
- One more opportunity to get input from the public



Phase Three: Plan Implementation



3.0 Plan Implementation Tools and Techniques



Plan Implementation: Charrette Follow-up

- The goal of the Plan Implementation phase is to refine and finalize Charrette products to guide the project through adoption and development.
- Plan Implementation
 - Information and Relationship Strategy
 - Product Refinement
 - Presentation and Product Finalization



3.2 Product Refinement

Goal

- Ensure that the Charrette Plan is feasible

Tools

- Document Review and Feedback
- Document Revision



3.3 Presentation and Product Finalization

Tool: Final Project Public Meeting

Purpose: Perform one last feedback loop with the public

Process: Hold two public meetings on subsequent evenings and make refinements between them based on the first evening's input





Dynamic Planning Strategies

10. Hold the Charrette on site

- Working on site fosters the design team's understanding of local values and traditions, and provides the necessary easy access to stakeholders and information



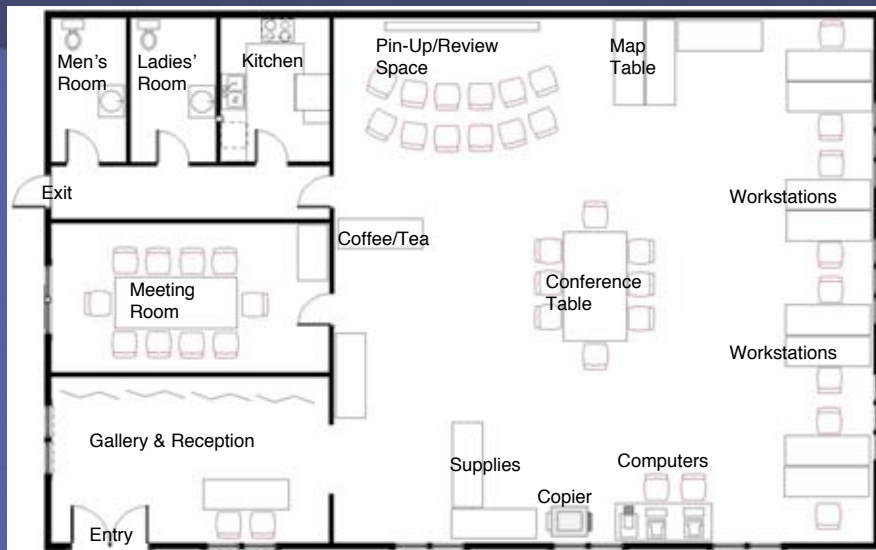
Studio Logistics and Set-up

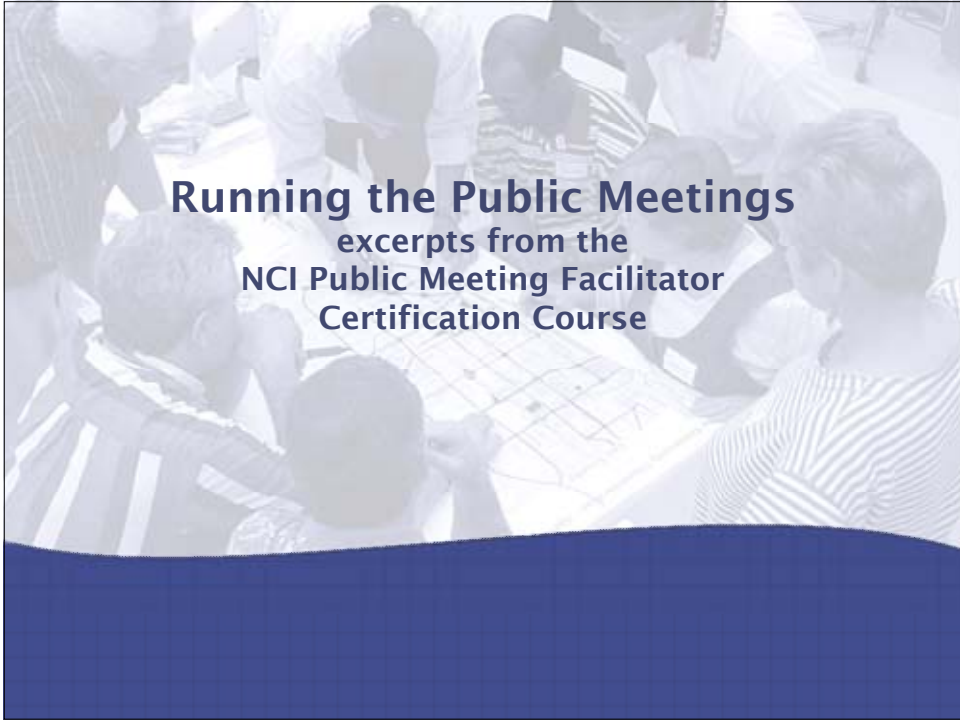
Charrette Studio

- Location
- Size
- Activities:
 - Public Reception
 - Design Team Workshop
 - Stakeholder Meetings



Charrette Logistics





Meeting Set-up

The Facilitator's "Preventions"

- Meeting Purpose
- Desired Outcomes
- Agenda
- Ground Rules
 - no one interest dominates
 - be concise
 - no personal attacks
 - stay on topic
 - practice listening
- Parking Lot

