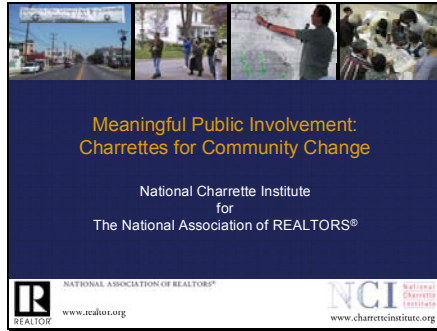


Slide 1



This presentation has been created by the National Charrette Institute for the National Association of Realtors to educate people about the features and advantages of a properly orchestrated planning and development approvals process.

The script has been crafted for ease of use during your presentation. Simply read the script below each slide (in this field) and click to the next slide at the end of the text. If you have any questions about this presentation, please contact [info@charretteinstitute.org](mailto:info@charretteinstitute.org) or [jmolinaro@realtors.org](mailto:jmolinaro@realtors.org).

Slide 2



The following presentation will show how Charrettes can be used to involve the public and all other stakeholders in the making of community plans. Stakeholders are members of the community who have a vested interest in whether or not the plan succeeds.

Citizen participation has become an inevitable fixture in today's development approvals process. While many agencies and developers anticipate this with some degree of dread, others are finding a way to turn citizen participation into a win-win. A properly orchestrated process can not only lead to easier approvals, but can actually improve the project's outcome in terms of a marketing position for the developer, and in the building of trust between citizens and public agencies. The NCI Charrette Process has been used on hundreds of projects, resulting in thousands of built acres of smart growth development and redevelopment. It provides a

constructive channel for NIMBY interests. The Charrette Process eliminates the sponsor's common fear of losing control of the outcome and/or wasting time and money on a failed effort by establishing clear roles within an atmosphere of trust.

Throughout this presentation, I will talk about why many people are frustrated by public involvement processes, and how the Charrette can provide the missing pieces to facilitate productive community decision making. We'll examine how a Charrette works and when it is right to use one. We'll also discuss the Charrette in context – what needs to happen before and after the Charrette to create a buildable plan.


Slide 3



From the destruction of tea during the Boston Tea Party to New England town meetings, the United States has a great tradition of public involvement. Our democratic form of government was born out of frustration when citizens felt that their voices were not being heard.

Slide 4

The New England Town Meeting



- Famously portrayed by Norman Rockwell, a tradition of people working together to solve problems to improve their communities

©Norman Rockwell Estate Learning Company

An example of a traditional form of public participation is the New England town meeting, a custom of people working together to solve problems and improve their communities. Town meeting participants debate issues and vote on the spot. The town meeting is a fully collaborative decision making process, during which attendees see decisions and outcomes as a direct result of their input.

Slide 5

People are getting involved in response to growth issues



- In many communities there is an atmosphere of distrust for planning and development projects

In Building New Ski Resort, Developers Face Avalanche of Obstacles

By [Name] in [Location]

When an environmental group...  
...and developers regarding plans to build the Woodloch resort, a grand...  
...in the...  
...There has been considerable opposition...  
...from environmentalists and a coalition of...  
...local residents and state politicians called...  
...the...  
...that the project will become an economic...  
...and...  
...of...

Today, people who have never before been involved in public debate are participating in community planning efforts. Many are doing so in response to development in their communities based on the perception that growth can only make things worse, particularly in regards to traffic. As people get involved in community decision making, they often become dissatisfied with their options for participation. They have come to expect inadequate involvement processes, leaving them frustrated and on their guard.

## Slide 6

Limited opportunities to participate

- People are increasingly dissatisfied with their options to participate in decisions that affect their communities
- Typical involvement options:
  - 3 minutes in a public hearing
  - An endless series of workshops



As people become involved in public processes, they realize that their options are very limited. They are given the opportunity to participate too late in the planning process or in a very limited capacity or, they are asked to weigh in after plans have been developed and decisions have already been made.

Typical options for public involvement are:

Public hearings where people typically have a maximum of three minutes to talk or an endless series of workshops that are usually spaced about a month apart.

Even when people are engaged, they can become alienated and apathetic when their input has no visible impact. People may be involved in an interesting, interactive meeting, with high hopes for the results, only to find that decisions are made behind closed doors. This results in apathetic statements such as, "They're just going to do what they want whether or not I get involved," and deters people from further involvement.

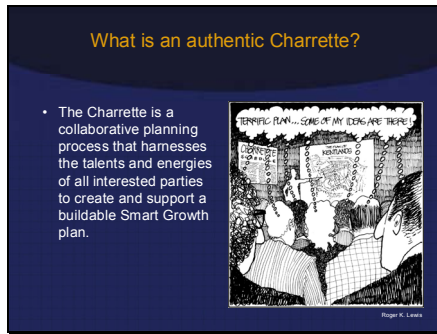


Slide 9



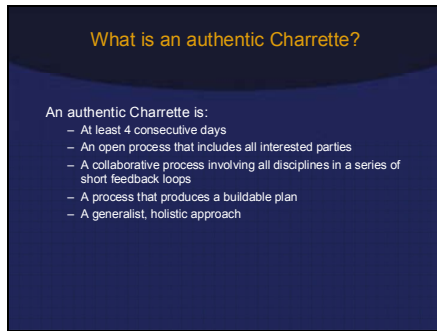
In this next section I will introduce the concept of the Charrette as a means to turn planning for Smart Growth development into a positive, community-building event.

Slide 10



The Charrette is a collaborative planning process that harnesses the talents and energies of all interested parties to create and support a buildable Smart Growth plan.

Slide 11



A Charrette is:  
At least 4 consecutive days  
An open process that includes all interested parties  
A collaborative process involving all disciplines in a series of short feedback loops  
A process that produces a buildable plan  
A generalist, holistic approach

## Slide 12

**Misconceptions about the Charrette Process**

An authentic Charrette is not:

- A one-day workshop
- A multi-day marathon involving everyone all the time
- A plan authored by a select few that will affect many
- A "visioning session" that produces non-specific results


The term Charrette is overused and abused. It has been used to describe everything from an afternoon meeting to a multi-day marathon. The result has been a widely misinformed and negative perception of the process, causing difficulty for citizens and professionals alike.

An authentic Charrette is not:  
Just a one-day workshop  
A multi-day marathon involving everyone all the time  
A plan authored by a select few that will affect many  
A "visioning session" that produces non-specific results

## Slide 13

**Origin of the term "Charrette"**

- The French word "Charrette" means "cart" and is used to describe the final intense work effort expended by art and architecture students to meet a project deadline.
- At the École des Beaux Arts in Paris during the 19th century, proctors circulated with carts to collect final drawings while the students frantically put finishing touches on their work.



The French word "Charrette" means "cart" and is used to describe the final intense work effort expended by art and architecture students to meet a project deadline. At the École des Beaux Arts in Paris during the 19th century, proctors circulated with carts to collect final drawings while the students frantically put finishing touches on their work.

The Charrette for Smart Growth combines this creative, intense work session with a collaborative public workshop.

Slide 14

What can a Charrette do?

Charrettes result in feasible plans for:

- Revitalization areas, such as Main Streets
- New development plans
- New annexations
- Community-wide visions
- Comprehensive plans



Photo Transformation: Urban Advantage

What are Charrettes for? They can be used for any Smart Growth plan including:

- Revitalization areas, such as Main Streets
- New development plans
- New annexations
- Community-wide visions
- Comprehensive plans

Charrettes are best used in situations with real projects when development is imminent. Charrettes are particularly useful in contentious situations that require conflict resolution.

Slide 15

The Charrette supports community

- The Charrette makes community planning a combination of a town meeting and a barn raising



LCA Town Planning

Photo: The Barn

A Charrette is like another great American tradition – the barn raising. It involves the entire community, leveraging people’s unique talents to build something that no one person could achieve by him or herself.

Slide 16

The Charrette creates a town meeting atmosphere

- The whole community is involved in a fun, engaging design workshop that spans many days – a town meeting atmosphere



LCA Team Photos ©2011 K&D

The whole community is involved in a fun, engaging design workshop that spans many days – a town meeting atmosphere

Slide 17

The Charrette provides many opportunities for participation

- In a Charrette, everyone interested helps out in a team effort that taps their unique contribution
- Professionals provide design and strategic input
- Citizens provide local information, feedback, and critique




LCA Team Photos ©2011 K&D

The Charrette provides hours of opportunities for participation. Everyone interested helps out in a team effort that taps their unique contribution. In the Charrette, a team of professionals provide the design and implementation strategy while citizens provide their local knowledge, vision, and passion for their community.

Slide 18

Why do Charrettes work?

- The Charrette brings decision makers together in one place for a concentrated effort to create a detailed, feasible plan.




©2011 K&D

The Charrette brings the decision makers together in one place for a concentrated period of time to create a detailed, feasible agreement that can otherwise take months to achieve. Because everyone is involved early in the process and is given many opportunities to voice their opinions, Charrettes often result in NIMBYs becoming the project's champions.

Slide 19

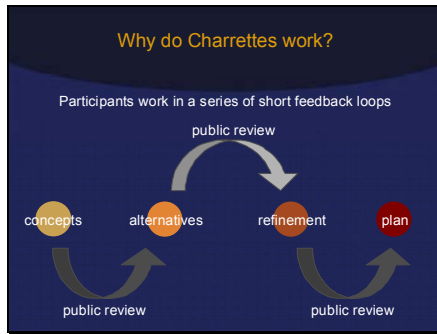
Why do Charrettes work?

- The Charrette involves everyone in a facilitated process so everyone is heard and no one dominates.



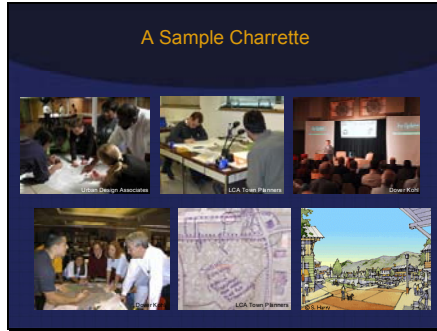
Unlike many public meetings, a Charrette is expertly facilitated so that everyone can be heard and no one dominates.

Slide 20



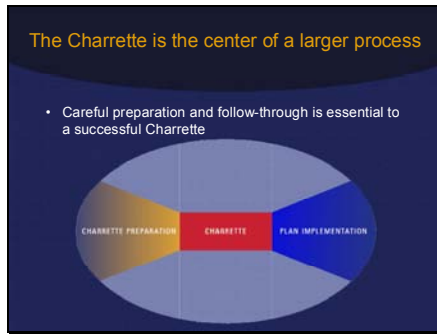
One of the unique traits of the Charrette is the series of feedback loops. There are three major ones, where design ideas are created based upon a public vision, and presented within hours for further review, critique, and refinement. These feedback cycles foster a holistic understanding of complex problems by all participants and form the basis of a plan that reflects all vital viewpoints. It results in true buy-in by everyone involved, who are thereby inspired to support the plan, allowing it to overcome the inevitable challenges on its path to implementation.

Slide 21



In the following section, I will take you through a sample Charrette day-by-day and show you some typical Charrette products.

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It is important to point out that the Charrette is the focal point of a much larger process.

The preparation phase must be completed before a successful Charrette can be held. This phase includes research, education, and Charrette preparation and takes anywhere from 2 to 6 months to complete.


In addition, continued work during the plan implementation phase is required to ensure project success. Plan implementation times vary depending on jurisdiction.

Slide 23

**Pre-Charrette: Getting Charrette-Ready**

The Preparation Phase

- Project Set-up and Organization
  - shared team understanding
- Stakeholder Involvement
  - establishing trust
  - getting all the right people there
- Base Information
  - getting all the right information there
- Feasibility Studies
  - working toward a buildable plan
- Logistics
  - maximizing resources



Getting Charrette-ready includes project set-up and organization, stakeholder involvement, base information gathering, feasibility studies, and logistics planning.

In order to run a successful Charrette, the people must be ready and the information must be ready. Being “people-ready” means that:

- the key stakeholders agree to participate, with a shared understanding of the project, process, and their roles, and that
- there is an agreement on the nature of the problem and the need to act on it

Being “information-ready” means that:

- all the information required to make informed decisions is available.

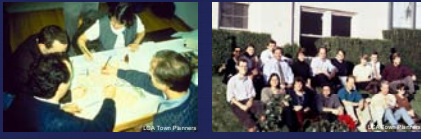
Please note that the type of information and level of detail required varies with the project.

Slide 24

**During the Charrette: Charrette Roles and Process**

The Charrette Design Team

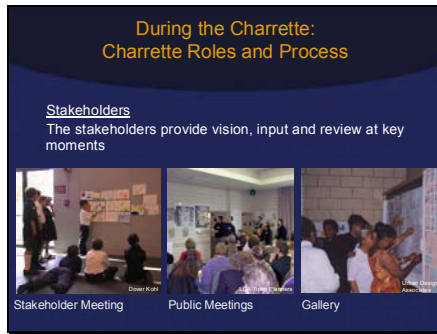
- The Charrette Design Team works uninterrupted to produce the plan



The Charrette design team is comprised of the project sponsor (for example, a city planning agency, developer, or community group) and a cross-disciplinary group of professionals representing the specialties required to achieve a holistic approach. This group is usually staffed (at minimum) with planners, architects, landscape architects, transportation engineers and economists. The design team sets up a Charrette studio either at or somewhere near the site. The studio is a complete temporary design office and community meeting space. Close proximity to the site is important in order to make

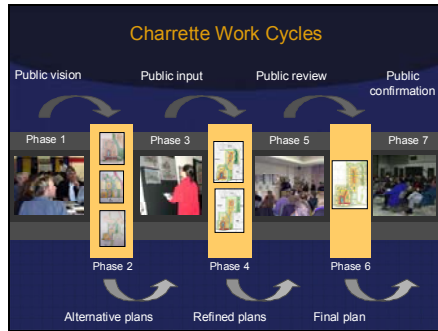
it easy for people to participate and for the design team to have quick access to the site. Charrette studios have been located in empty main street storefronts, community centers, high schools, and armories.

Slide 25



Key stakeholders including citizens, land owners, business owners, and non-governmental organizations provide vision, input and review throughout the Charrette. Stakeholder involvement is solicited through scheduled meetings, large, open public meetings, or dropping by the gallery. It is important to note that **NOT EVERYONE IS INVOLVED ALL OF THE TIME**. The studio's hours are long enough to accommodate everyone's schedules, and each person's level of involvement in the process is different. Some stakeholders want and need to be there often, but other people need only attend public meetings and open houses.

## Slide 26



The workflow of the Charrette involves a series of collaborative design and public input cycles for multiple, consecutive days.

In phase 1[CLICK], the public provides vision and project direction through a hands-on workshop. The design team takes this vision [CLICK] and creates a series of alternative plans and then [CLICK] solicits public input at another public meeting. This input is used to refine the alternatives [CLICK] and create more detailed plans that are again reviewed and critiqued [CLICK] by the public during an open house. The design team further refines [CLICK] and narrows the feedback into a final plan and set of implementation documents [CLICK] to be presented for public confirmation on the final night of the Charrette.

Let's look at these phases in more detail by going through a seven day Charrette day by day. Of course, not all Charrettes last seven days. Less complex projects can be considerably shorter. However, four days is the minimum number necessary for sufficient feedback loops.

Slide 27



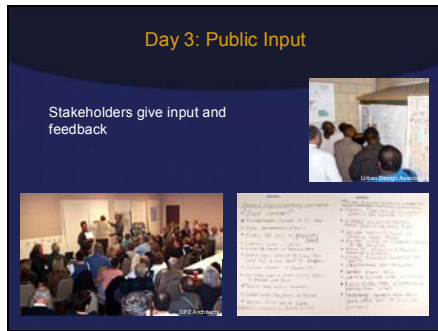
The first day of the Charrette is all about sharing information. The Charrette begins with a public, “hands-on” workshop where everyone works in small groups to describe and draw their vision of the project. A citizen representative from each team presents their top ideas to the whole assembly. Everyone learns from each other’s work and several alternative themes begin to emerge.

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Over the subsequent days, the design team works to develop plans based on the public’s vision. The team meets with key stakeholders and develops concept alternatives.

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As the designs are being developed, stakeholders are invited to give their input. Stakeholders are encouraged to become involved and to give input while ideas are fresh.

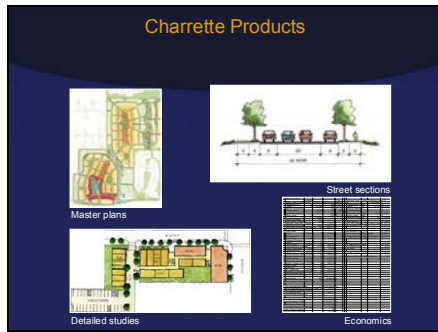


Slide 33



On the final evening of the Charrette, the design team presents all elements of the project including master plans, building designs, economic and transportation impacts and strategy, and the implementation plan. Everything needed to move the project forward into implementation is covered. Another round of public input is gathered for the final refinement phase.

Slide 34



Here are a few examples of the types of drawings and documents that are created at the Charrette, including everything from master plans to economic analysis.

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Realistic architectural renderings can be hand drawn or created by computer. All-important environmental analysis and codes are also presented.

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**Charrette follow-up: Implementation Phase**

- The goal of the Plan Implementation Phase is to refine and finalize Charrette products to guide the project through adoption and development.
- Tasks include:
  - Team Debriefing
  - Plan Implementation Strategy
  - Document Review and Feedback
  - Document Revision
  - Final Project Public Meeting
  - Project Closeout


The project doesn't end with a Charrette. Following the Charrette, the design team analyzes and tests the plans for any further refinements. Additional stakeholder input is gathered. Final changes are made and the plans are presented to the public at a Charrette follow-up meeting that occurs no more than a month later.

The goal of the plan implementation phase is to refine and finalize Charrette products to guide the project through adoption and development. It is important to maintain political leadership and support, keep citizens informed and involved, and coordinate with approving agencies.

Slide 37

**Key differences between the Charrette and other planning processes**

- Compressed work sessions
- Communicate in short feedback loops
- Work collaboratively
- Work for at least 4 consecutive days
- Study the details and the whole
- Work on-site
- Produce a buildable plan



Now that we've walked through the process, let's step back and look at the key underlying principles required for a successful Charrettes.

These are key features of the Charrette that makes it different from other planning processes:


- Compressed work sessions
- Communicate in short feedback loops
- Work collaboratively
- Work for at least 4 consecutive days
- Study the details and the whole
- Work on-site
- Produce a buildable plan

Slide 38

**Keys to the Charrette Process**

Compress Work Sessions

- Time compression facilitates creative problem-solving by accelerating decision-making and reducing unconstructive negotiation tactics.



The first key principle is the use of compressed work sessions. Time compression facilitates creative problem-solving by accelerating decision-making and reducing unconstructive negotiation tactics.

Slide 39

**Keys to the Charrette Process**

Communicate in Short Feedback Loops

- Regular stakeholder reviews quickly build trust in the process and foster true understanding and support of the product.




The second key strategy is to communicate in short feedback loops. Regular stakeholder reviews quickly build trust in the process and foster true understanding and support of the product. When people are involved throughout the design process, they see the impact of their participation. They feel respected and that their time was well spent when their ideas are heard, discussed and integrated into the design.

Slide 40

**Keys to the Charrette Process**

Work collaboratively

- Create a long-lived plan based on each individual's unique contributions. The Charrette process gives a plan a mutual authorship and vision shared by all who participate. Having contributed to it, they are in a position both to understand and to support its rationale.




Working collaboratively helps to create a long-lived plan based on each individual's unique contributions. The Charrette process gives a plan mutual authorship and vision shared by all who participate. Having contributed to the plan, they are in a position both to understand its rationale and to support its implementation.

Slide 41

**Keys to the Charrette Process**

Work for at Least 4 Consecutive Days

- The best results come from 3 feedback sessions, scheduled at least a day apart.




There are many reasons to work for at least 4, and ideally 7 days in a row. Most important, getting buy-in and support from all participants requires 3 feedback loops, that necessitate working for AT LEAST four consecutive days. Another reason is that this continuous work session provides time to study the problem in depth. The Charrette is a creative process which requires sufficient time for a problem to be studied, alternatives to be drafted and debated and for decisions to be made. Working for at least 4 consecutive days allows time for controversial subjects to be aired and resolved. And finally, working in an open studio for at least 4 consecutive days provides the greatest opportunity for the most people to get involved.

Slide 42

**Keys to the Charrette Process**

Study the Details and the Whole

- Lasting agreement is based on a fully informed dialogue.




An important element of the Charrette design process is to study the details and the whole. Lasting agreement is based on a fully informed dialogue. It is only when you study the details that you get the basis for lasting agreement. Without looking at the big picture as well as the details, you run the risk of missing core issues, about which people often disagree. It is by examining things at a finer scale that helps people gain a shared understanding of what the real impacts may be.

Slide 43

**Keys to the Charrette Process**

Work on Site

- Working on-site fosters participants' understanding of local values and traditions and provides easy access to stakeholders and information.



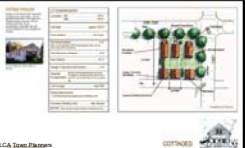
Working on-site fosters participants' understanding of local values and traditions and provides easy access to stakeholders and information. The Charrette studio is a temporary office and community meeting space that serves as the headquarters for the process. Close proximity to the site is important to make it easy for people to participate and for the design team to have quick access to the site.

Slide 44

**Keys to the Charrette Process**

Produce a Buildable Plan

- The success of a community's work to plan and build together depends on implementation tools such as codes and regulating plans.



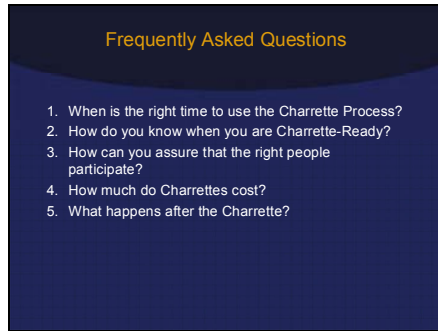
It is imperative that the Charrette result in a buildable plan. This means that every decision point must be fully informed, especially by the legal, financial and engineering disciplines. The success of a community's work to plan and build together hinges on the implementation tools such as codes and regulating plans. Plans that sit on the shelf contribute only to citizen apathy.

Slide 45

**Benefits of the Charrette process**

- Creates public trust through meaningful public involvement and education
- Creates a better plan through diverse input and involvement
- Creates a shared vision by turning public opposition into support

A well-run Charrette process:  
Creates public trust through meaningful public involvement and education  
Creates a better plan through diverse input and involvement and  
Creates a shared vision by turning public opposition into support



## Answers to the Frequently Asked Questions:

Q: When is the right time to use the Charrette Process?

A: The right time to use a Charrette is when you have all the right people involved. Charrettes are ideal for projects in which development is imminent and/or when there is a real developer to implement the results. Charrettes are especially useful for projects that have significant community impact and contentious situations that require conflict resolution.

Q: How do you know when you are Charrette-Ready?

A: In order to run a successful Charrette, the people must be ready and the information must be ready. Being “people-ready” means two things. First, the key stakeholders agree to participate, with a shared understanding of the project, the process, and their roles. And second, there is an agreement on the nature of the problem and the need to act on it. Being “information-ready” means that all the information required to make informed decisions is available.

Q: How can you assure that the right people participate?

A: The public involvement process is based on a diverse group of stakeholders. Stakeholder outreach and engagement is key to the Charrette preparation phase. To assure diverse and representative participation in the charrette, multiple outreach methods must be used. Some of these methods include: attending neighborhood

meetings, engaging churches and organized groups, one-on-one meetings with key stakeholders, mailings, phone calls, e-mails, handbills, signs, websites and newsletter announcements.

Stakeholders should include final decision makers, all people who will be affected by the outcome, people who have power to assist, and very importantly, people who can block a decision. Potential blockers must be engaged early. Often, they turn into the project's biggest supporters.

Q: How much do Charrettes cost?

A: The Charrette process, including the necessary preparation and implementation phases, typically costs no more than a conventional process. In both cases, the same amount of base data research and product development are necessary and these elements generally cost the same. The Charrette, on the other hand, doesn't take as long. The costs are also loaded up front, instead of spread out over a longer period of time. In fact, the use of Charrettes has the potential to save a great deal of money by reducing the potential for rework later.

Q: What happens after the Charrette?

A: Public involvement and design are not over when the Charrette is complete. After the Charrette, the all-important implementation phase begins. The design team analyzes and tests the plans for any further refinements. Additional stakeholder input is gathered. Final changes are made and the plans are presented to the public at a Charrette follow-up meeting that occurs no more than

four to six weeks later. An implementation strategy is devised and the plan is then ready to move into engineering and/or adoptable language development phases.

Slide 47

Charrettes have proven successful for all parties

"... Several League members attended the Charrette in February and felt that it successfully encouraged public participation in the design process. They also felt that the Charrette increased the understanding of participants when compromises had to be made because some requests could not be accommodated without conflicting with others."

—Leslie Stewart, Action Chair, League of Women Voters of Diablo County

Slide 48

Charrettes have proven successful for all parties

"The Charrette epitomizes public empowerment in the planning process. By allowing the design team to work with the public (usually reserved for developers), the public is able to combine their unique knowledge of the community with the skill and expertise of the design team."

—Donna Gerber, Former County Supervisor, Contra Costa County, California

## Slide 49

### Charrettes have proven successful for all parties

"The Charrette process provides the forum for a reasoned discussion among all of the stakeholders, representing all viewpoints, both public and private, within a productive framework. The goal of the charrette is a result that melds these viewpoints into a viable project. The most important factor in the success of a Charrette is the full participation of all of the stakeholders."

– Mark Farrar, Principal, Millennium Partners