



# **Managing the Creative Design Process: Design Charrettes**

# What is a Charrette?

(<http://www.charretteinstitute.org/charrette.html>)

- ◆ The French word, "Charrette" means "little cart" and is used to describe the final intense work effort expended by art and architecture students to meet a project deadline.
- ◆ At the Ecole 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.

# What is a Charrette? (cont.)

- ◆ Today, a Charrette is a collaborative process for empowering people who are important to a project to work together and support the results.
- ◆ A Charrette is a rigorous, inclusive, cross-disciplinary, collaborative, and values and vision-driven process that produces the strategies and implementation documents for complex and difficult planning and design projects.

# What is a Charrette? (cont.)

- ◆ Charrettes can be used virtually any time a product needs to be created or designed.
- ◆ Some Charrettes focus on regional or local public and private land planning and development, while others focus on the design of public and private buildings.

# When Can a Charrette be Used?

- ◆ Pre-Conference Planning
- ◆ Data Gathering and Analysis
- ◆ Design Phase
- ◆ Conflict Resolution

# Charrette Objectives

- ◆ Produce a series of planning or design solution alternatives that reflect physical/natural conditions, appropriate architecture, market and sales projections, infrastructure capacity, and regulatory requirements.
- ◆ Discuss, test, argue and compose a “preferred solution” that achieves the best combination of existing and proposed uses and conditions.

# Charrette Objectives (cont.)

- ◆ Prepare a development and implementation strategy that fairly reflects how the project team can move forward.
- ◆ Produce a summary document that illustrates these concepts and plans and explains further actions, studies, meetings, plans, and documentation prior to proceeding further

# Types of Questions Answered by Charrettes

- ◆ Is the project (or unit of analysis) feasible:
  - Can it be done?
  - If so, should it be done?
  - If not, what could be done?
- ◆ What are some problems, issues, concerns, and challenges associated with the project?
- ◆ Is the project compatible with the site:
  - Can the site accommodate the proposed project scope?
  - Is the proposed planning or design solution appropriate for the site?



# Types of Questions Answered by Charrettes (cont.)

- ◆ What are the preliminary performance parameters associated with the proposed planning or design solution?
- ◆ What resources are required to proceed?

# Elements of a Charrette

## ◆ The **People**

- The success of a charrettes depends on having the right type and mix of people, properly trained in the charrette process.

## ◆ The **Setting**

- The physical place or setting of the charrette is also critically important for its success, because the meeting space will take-on an intensity of its own as the charrette progresses.

## ◆ The **Format** and **Schedule**

- Each charrette should be customized to the specific context and needs of the project

# The People

## ◆ Key Owner Team Representatives

- Part of the success of the charrette is for the project owner team to actively establish why the charrette is being held, what the owner's objectives are, and how the charrette will be conducted.
- In order for the charrette to be taken seriously it must be sanctioned by the highest level of project ownership.
- It is very important that the owner team not attend the entire charrette.

# The People (cont.)

## ◆ Key Consultants

- The required consultant group depends entirely on the size, scale and type of proposed project, and should include all design disciplines relevant to the project.
- Their function is to actually produce design solutions

## ◆ Charrette Manager/Facilitator

- A single, noted and strong individual, who is a recognized professional with experience in conducting previous charrettes, and who is knowledgeable with all phases of a project, needs to lead, manage and facilitate the charrette process.

# The Setting

- ◆ The charrette should be held in a comfortable, secure, and project-neutral room of adequate size, capable of accommodating 20-30 people into three (3) different work groups that can work independently

# The Setting (cont.)

◆ The space should have the following characteristics:

- No external distractions
- Well illuminated (preferably with natural light during the day, and with adequate lighting at night)
- Enough table working space, and ample wall space to hang plans and drawings.
- Audiovisual and Internet capabilities.
- Located close-to or near-by the project site.
- Kitchen, restroom and janitorial facilities.
- Large enough to provide some level of solitude, and small enough to conduct group presentations

# The Format and Schedule

## ◆ Pre-Charrette Activities:

- Select the Charrette Manager, and Charrette Team of Consultants
- Develop the Charrette Agenda, and make all Logistic Arrangements for the charrette (location, audio-visual requirements, materials and supplies, food and beverages, etc.)
- Prepare an Owner's Statement of Purpose, Objectives, and Scope for the project, and the specific charrette activities.
- Prepare a detailed Charrette Information Package to be sent to all participants that includes all project data and information relevant to the charrette activities

# The Format and Schedule (cont.)

## ◆ Charrette Activities

(in either a two- or three-day agenda):

- Discussion of the Charrette Agenda
- Discussion of the Owner's Statement of Purpose, Objectives, and Scope
- Development, definition, illustration, presentation, and discussion of three Strategic Planning Alternatives for the project
- Selection of Preferred Strategic Plan
- Development, definition, illustration, presentation, and discussion of three Conceptual/Schematic Design Solution Alternatives for the project, within the selected strategic plan



# The Format and Schedule (cont.)

## ◆ Charrette Activities: (cont.)

- Selection of Preferred Conceptual/Schematic Design Solution
- Development, definition, illustration, presentation, and discussion of three Plan of Action Alternatives for further development and implementation of the Preferred Strategic Planning Solution, and the Preferred Conceptual/Schematic Design Solution
- Selection of Preferred Plan of Action

# The Format and Schedule (cont.)

## ◆ Post-Charrette Activities:

- After the charrette is completed, the Charrette Manager collects, organizes, and edits all the material developed during the charrette (e.g., the plans, drawings, and illustrations) into a concise Final Charrette Report.
- The Final Charrette Report is a proprietary explanation of how the potential project should proceed, and outlines key assumptions, risks, constraints, and opportunities that make the project feasible.
- The Final Charrette Report should be prepared so that other project stakeholders unable to attend the Charrette can easily understand the process followed, the products developed, and the plan established.

# Charrette Operational Principles

## ◆ Work Collaboratively

- A shared vision and effort create the force necessary to achieve the charrette goals

## ◆ Involve Stakeholders

- Anyone critical to the success of the project must be involved in the process

## ◆ Cross-Disciplinary Teams

- Each team member contributes skills and a function essential to achieve the charrette goals

## ◆ Physical Proximity to People and Place

- Maximize the range of continuous feedback and communication for increased exchange of information and learning

# Charrette Operational Principles (cont.)

## ◆ Relevant Content and Measurable Results

- Stakeholders must see the value and impact of their participation

## ◆ Sustained, Focused Work

- Achieving the charrette goals requires a committed and one-pointed effort

## ◆ Time-Compressed Work

- Time compression is a boundary that intensifies a focus on the highest leverage elements to achieve the charrette goals

## ◆ Multiple, Short Feedback Cycles

- All ideas, concepts and designs are analyzed, tested and refined at critical points in the process

# Charrette Operational Principles (cont.)

## ◆ Applying Key Levers

- Capitalize on forces, which can include people, places, time and events, to achieve the charrette goals

## ◆ Work at Multiple Scales

- Working at multiple scales facilitates understanding of the context, relationships and hierarchies of similar patterns within the whole

## ◆ Values, Mission & Principles Based Decision Making

- Stakeholders agree to use a values-based, mission and principles-driven, decision making process that includes a set of objectives, milestones, consequences and operational rules