Two main barriers arise when there are fifteen or more people present in a brainstorming session that attempts to discuss multiple ideas or problems at the same time. First, most brainstorming tools and methods focus on a small group of people discussing one single problem; second, most methods focus the thinking process for all attendees in one particular direction. As the number of people involved increases and the ideas become more complex, the meeting facilitator can become overly taxed, resulting in failed creative thinking sessions and a loss of time and effort.

The charrette (a Beaux Arts-derived term for a short, intensive design or planning activity) workshop is designed to stimulate ideas and involve the public in the community planning and design process. As one of the oldest methods used to organize thinking about more than one idea within a large group of people, it was first used in the early 1800s by architecture students who used carts to move community members from one place to another to get fast approval of their work. In Charrette Procedure, the larger group of people is divided into small groups of approximately five people, with the number of sub-groups dependent on the number of ideas discussed. Each group is assigned one topic to brainstorm and generate ideas and feedback. These generated ideas are then moved to the next group to build upon; they contribute to the topic with more analysis and brainstorming. The topic keeps moving until it has been discussed by each of the groups. The final ideas are collected, analyzed, organized, and prioritized to reach final solutions for the discussed topic.

Charrette Procedure is a valuable tool for laying the foundation for the development of a more formal plan (for example, comprehensive plan, master plan, strategic plan, etc.). It is most effective as a component of the formal planning and design process. It can be used in a multitude of applications such as:

- S.W.O.T. identification (strengths, weaknesses, opportunities, threats)
- quality of life assessment
- issue identification
- needs assessment
- project development and identification
- strategic planning
- energize the community
- consensus building
- visioning and visualizing
- communication and network enhancing

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1 Adapted from “The Neighborhood Charrette Handbook”, Dr. James A. Segedy, AICP and Bradley E. Johnson, AICP
When to use the Charrette Procedure

- More than one topic is being discussed during the session.
- When a large number of people (15 to 25) are involved in the discussion.
- The time to discuss each topic is limited.
- Building on existing ideas created by others is determined to be beneficial.
- To ensure all the attendees contribute to the discussion.
- To create a visual plan or diagram that makes it easier for participants to “see” the same vision and build an even better one together.

What a Charrette Will Accomplish

A charrette will:

- Generate strong citizen participation and motivation towards planning and community development projects.
- Enhance communication within the neighborhood and increase awareness of important issues.
- Bring community groups, leaders, and citizens together to generate a common community vision and solve community challenges.
- Develop “doable” community development projects based on citizen input.
- Identify potential funding sources for neighborhood projects.
- Overall, give the community a starting point with specific action steps for successful community development and quality-of-life enhancement.

A Three-Phase Process

The Charrette Process has three phases and usually takes between two and three months to complete.

- **Phase One:** The Pre-Charrette focuses on developing, and working with, a steering committee who will determine the primary focus of the charrette and handle the logistics for Phase One and Two. It is suggested that the steering committee work with the charrette facilitator to identify a preliminary set of issues to be addressed during the charrette.

- **Phase Two:** The Charrette Workshop is generally a two-day, intensive planning and design workshop involving the community in a needs assessment, interviews with community groups, prioritization of issues, development of recommendations, the identification of neighborhood development projects, and implementation strategies.

- **Phase Three:** The Post-Charrette consists of the preparation of a final document outlining neighborhood strengths, challenges, recommendations, neighborhood development projects, action steps, and potential funding sources. The third phase also includes preparing and delivering a formal presentation open to all members of the neighborhood and greater community. It is during this phase that the community begins implementation.
Phase One: The Pre-Charrette – Unpacked

Issue/Problem Identification – This is probably the most important step in the process. The community must first determine that it wants to get involved in this process, and is willing to do something with the results.

For any community planning activity to be successful, the plan must actively involve and be supported by its members, not just a few of its leaders. While the charrette workshop itself must be a community-wide endeavor, it begins with the efforts of a few dedicated leaders and a steering committee that will establish the foundation.

The community leaders will:

- define the primary and secondary issues related to the project,
- determine the scope of the project, and
- identify the geographic area of the project.

The Steering Committee – To begin the process, and to see it through to its ultimate fruition, it is usually best to identify a diverse group of local citizens, the steering committee, who may serve as the coordinators and facilitators of the process.

- Create a citizen action group representing a broad base of community interests (this will vary according to issues) as outlined below.
- The committee should be between 9 and 15 persons.
- It must be sure of diversity of opinions and ideologies.
- It should include people actively interested in the issues and their solutions such as: business community, neighborhood/citizen/homeowner associations, elected officials, technical staff, church/religious organizations, youth, service groups, public/private schools (faculty, staff, students, administration, etc.), city and county officials, senior citizens, and others.

Steering Committee responsibilities:

- Coordinate charrette activities.
- Establish timeline and meeting schedule.
- Establish preliminary list of issues/charrette focus.
- Arrange for financial support and manage charrette budget.
- Identify preliminary issues to be addressed during workshop.
- Assist in workshop facilitation.

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

The Facilitator

- Must be objective.
- Must be a good communicator.
- Must be trusted by the participants.
- Must be comfortable with the subject matter.
- Must be comfortable asking and answering difficult questions.
Developing community relations and public awareness – The key to making the charrette an integral part of a successful community planning and design effort is an informed public. One of the easiest, and most effective means of informing and involving the community is through the local media (print, radio, television, social media, etc.). The very nature of their existence is associated with being involved in the local community and they are usually very eager to help in the process. Be sure to generate posters, handbills, and fliers. Create press releases, write articles supporting the process and illustrating the issues. Inform service and religious organizations, make presentations to groups, share information, and encourage participants.

Assemble support information – An effective process begins with good information. Much of the charrette process builds on public input, but a solid base of technical information is critical to having a solid foundation to build on. To help create this important database:

- Identify key players in the community.
- Document existing conditions.
- Review previous planning documents or efforts.
- Review studies or reports.
- Gather demographics and/or statistical information.
- Assemble video, photographs, or sketches.
- Conduct surveys.
- Research historical profiles (newspaper files, photos, archives, historical societies, books, etc.).
- Develop governmental regulations.
- Study reference materials and examples of related projects.

Phase Two: The Charrette Workshop – Unpacked

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

Establish dates – Consider community activities. Do not conflict with major school, church, sport, and other community activities or holidays. You may not find a “perfect” date, but every effort should be made to minimize conflicts. Workshops will involve day and evening activities. Determine if a weekday or weekends are best.

Establish the location for charrette workshops – The location should be large enough to hold a large community meeting. The space should be flexible with ample furniture (tables, chairs). There should be adequate utility support (electricity, restrooms, climate control, outlets, adequate lighting). It should be centrally located, easily accessible, and politically neutral. If possible, meals should be arranged for charrette team/participants.

Materials and Supplies

- **newsprint paper** – several large tablets are preferred — these are used for recording ideas. Also, the individual sheets can be used for archival purposes and are much easier to transport.
- **several broad tipped, bold color markers** for recording ideas onto newsprint paper
- **masking tape or tacks** to attach sheets to walls
- **items for formal presentations**
How the Process Works

Divide the participants into small groups (4 or 5 per group works best).

Ask each group to choose someone to record the ideas and document them; this person is called the recorder.

Assign each group a discussion topic. Ideally no more than four topics should be discussed at once. If the number of groups is larger than the number of topics, two groups may share the same topic to discuss separately.

Assign a time limit for the discussions. (Generally 10 minutes)

After preparing the groups for the discussion, small groups should start to brainstorm the topics and get their ideas circulated based on the following steps:

• **Step 1:** Each group discusses the assigned topic and the recorder collects the ideas to document them through the notes or other visual method. The leader for all the groups may warn the attendees about the time to make sure they are focused and remain active in discussing all the ideas within the 10-minute limit.

• **Step 2:** The recorder takes the ideas from the first group and moves to the second group to facilitate discussion of the ideas created by the initial group. The recorder collects and documents any new ideas that may be generated based on this second round. This process is repeated with the third and fourth group as needed.

• **Step 3:** The groups are then asked to review and discuss all of the ideas related to each of the topics. They are then asked to prioritize the ideas based on the most important and significant ideas in each topic.

• **Step 4:** The recorders come together to merge the ideas in each topic and across all topics. This step merges the efforts of all the groups and helps to compare the collected ideas for a more complete understanding of the topics, issues, and priorities.

• **Step 5:** The entire group meets to discuss the results related to each topic. At this stage, they review the priorities of each decision. The resulting decisions may be implemented in the form of an action plan for the next stages of the project.

Conclusions

The Charrette Process can provide a solution for many reported problems that brainstorming sessions face, including issues related to a large number of session attendees and discussing multiple topics in the same time frame. The above steps organize the meeting to overcome barriers and ensure everyone is active in the conversation. Charrette Process also guarantees that all topics are being discussed equally and with the same level of interest.
Phase Three: Post Charrette Activities

Post charrette activities focus on informing the public of the results of the charrette process, either by print media, social media, web pages or other means of communicating with the public. The final report must be highly visual, action oriented, user friendly, positive, jargon free, and extremely descriptive so that the general public understands the results and will buy into the project.

A leader must be found for each project to follow through from start to finish. Without that leader, the project has little hope of succeeding. It is often helpful to identify a single person to serve as a coordinator. The steering committee can also continue as the coordinating body.

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

People will rally around successful projects and efforts. Furthermore, successful projects will generate more volunteers who can then be integrated into long-term and non-visible projects. One of the community's greatest resources is it local citizens. An involved, empowered and focused group of volunteers can be a true catalyst for turning the vision into reality!