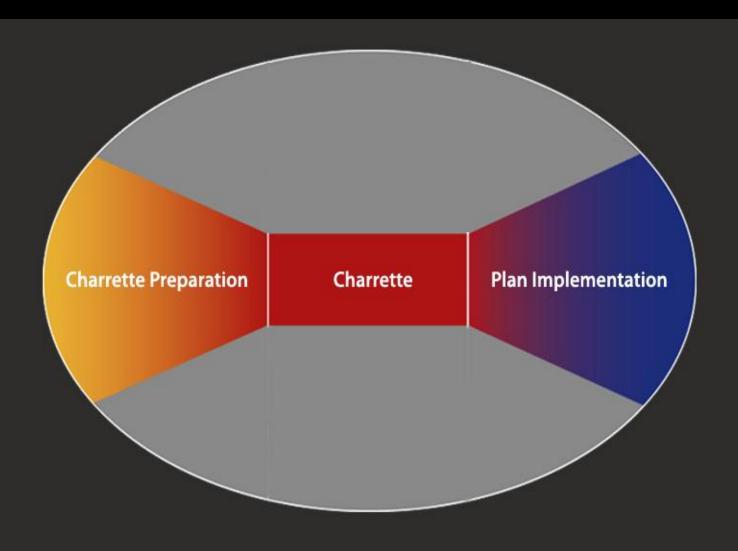
# NCICharretteSystem

The Breakthrough Planning Tool for Community Transformation

# Tools and Techniques

# The NCI Charrette System



### The Charrette System Phases

research, education, charrette preparation

charrette

plan implementation

1

1-9 months

 $\binom{2}{}$ 

2-4 months

 $\left(3\right)$ 

Project Assessment and Organization

Stakeholder Research, Education, Involvement

Base Data Research and Analysis

Feasibility Studies and Research

Charrette Logistics

Organization, Education, Vision

Alternative Concepts Development

Preferred Plan Synthesis

Plan Development

**Production and Presentation** 

Project Status Communications

**Product Refinement** 

Presentation and Product Finalization

# Research, Education, Charrette Preparation

research, education, charrette preparation

charrette

pıan implementatior



Project Assessment and Organization

Stakeholder Research, Education, Involvement

Base Data Research and Analysis

Project Feasibility Studies and Research

Charrette Logistics

-(3)

### 1.1 Project Assessment and Organization



**Guiding Principles** 

Objectives & Measures Draft

Stakeholder Analysis

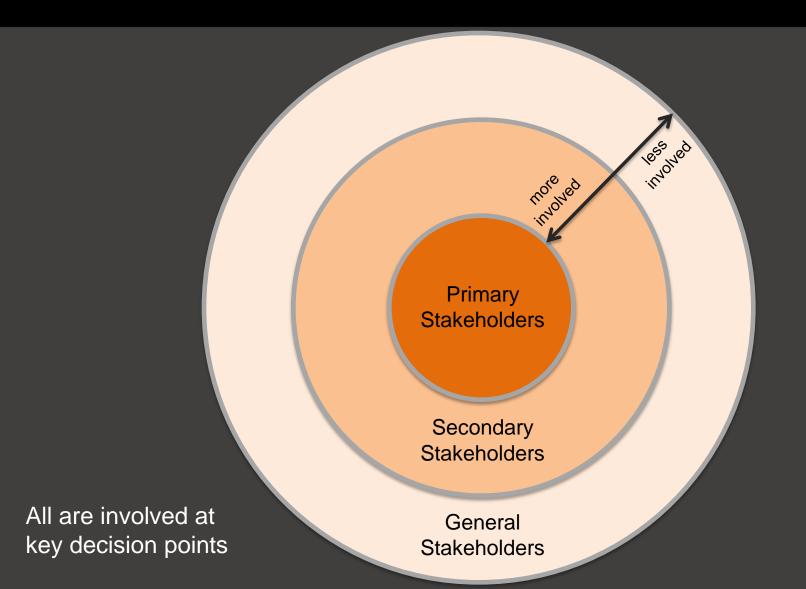
Charrette Purpose and Products

**Complexity Analysis** 

Charrette System Road Map

Charrette Ready Plan

### Stakeholder Levels of Involvement



### 1.1 Project Set-up and Organization

**Tool:** Project Team Organization Meeting

Purpose: To assure that there is a shared understanding of the project goals and process

#### Process:

- The project management team meets to begin the project
- Project Team:
  - Sponsor/Client and Staff
  - Consultants
  - Primary Project Partners
    - Elected official, partnering agency, key organizations

# **Guiding Principles**

 Guiding principles keep the project team and charrette participants on task, are used to resolve conflicts of opinion and help avoid costly rework and unnecessary effort that stems from following tangents to the core purpose of the project



## **Guiding Principles**

#### **Example Guiding Principles:**

The following guiding principles will guide the Friends Center campus renovation project:

- The project will demonstrate leadership in environmental design, evidenced by LEED certification.
- Spaces will be healthy with natural light & clean, fresh air.
- The campus will blend work and worship, fostering interaction between groups.
- The campus will facilitate the work of its tenants.
- The campus will be a resource for underserved communities.
- Hospitality and safety will be in balance.
- Life-cycle costs will help guide equipment choices.

### 1.1 Project Assessment and Organization

**Tool:** Objectives and Measures Draft

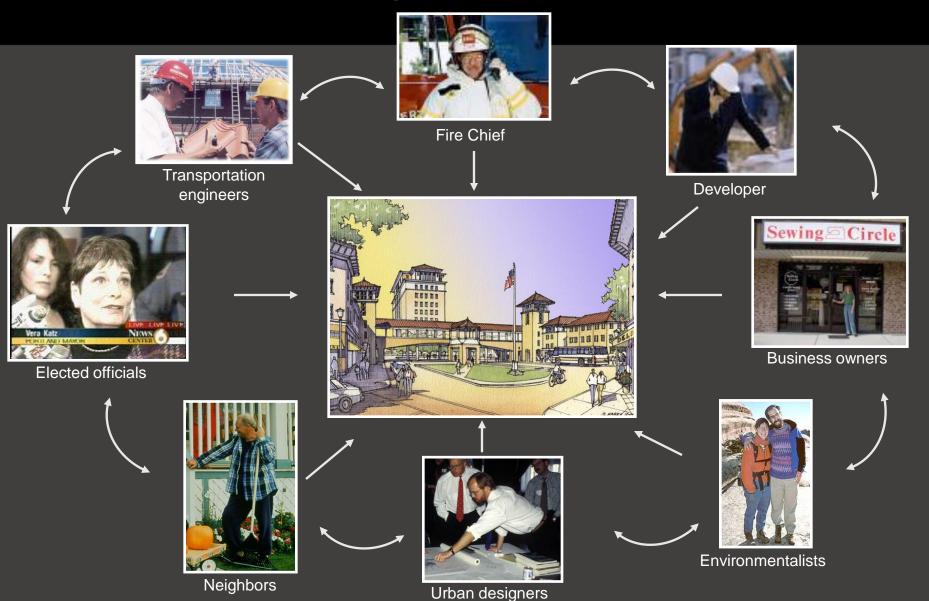
Purpose: The Objectives and Measures document is a decision-making tool used during the charrette. It represents a shared agreement on a prioritized set of clear, specific, measurable, and achievable objectives among primary stakeholders.

Process: The document is created in meetings with key project partners and stakeholders.

# Objectives & Measures Draft

Objective	Measure
Improve pedestrian, bicycle and vehicular safety, especially in relation to pedestrian/vehicle interactions	Traffic speeds Pedestrian crossing distances
Treat storm water on site	Acerage of natural filtering area
Provide for affordable housing	Housing prices as percent of median income
Economic feasibility	Project proforma, ROI (return on investment)
Provide easy, safe access to the regional trail system	Number of connections to trail Distance to trail from housing and commercial

## Stakeholders' unique contributions



### Stakeholder Levels of Involvement

Stakeholder Level	<b>Example Positions</b>	Suggested Involvement
Primary	Elected and appointed officials (city council, planning commissioners, steering committee members), agency staff (departments of transportation, EPA, transit authorities), site property owners	Interviews before the charrette, meetings during the charrette, should attend all public events, may drop into the studio anytime
Secondary	Non-governmental organizations (historic and art groups, churches, synagogues), individuals with businesses or residences directly affected	Interviews before the charrette, possible meetings during the charrette, should attend all public events, may
General	Community members	Should attend all public events, may drop into the studio anytime

Source: *The Charrette Handbook* p.38

### Stakeholder Analysis

 The Stakeholder Analysis lists the relevant viewpoints to be represented, the people, their affiliation, what a "win" is for each, and the level of engagement required for holistic, diverse feedback. This is the basis of the public involvement process.

#### Who are stakeholders?

- Decision makers
- People who may supply valuable information
- People who will be affected by the outcome
- People who have power to promote the project
- People who have power to block the project

# Sample Stakeholder Analysis

Viewpoint	Person / Affiliation	Issues	Win	Level	Outreach Strategy	Charrette Participation
Elected Official	Lucinda Wallis, Capital County	25 years of controversy, with nothing to show. Wallis is the project "champion."	A plan and codes agreed upon by the developer, and the neighborhood. A bulletproof public process. A national exemplar project.	Primary	Email, phone	Daily Team Meetings
Elected Official	Fercival Moccasin, Capital County	Concerned about project costs. Interested in a noncontroversial outcome.	A project that can be approved and supported by neighbors.	Primary	Email, phone	Public Meetings
Neighborhood Activists	Carrie Snodgras, Kris Tal, Terry Jensen, Medford District In provement 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 transit parking. The County must keep its promise and build the regional trail.	Secondary	Emails, letters	Separate Meeting
Neighboring Commercial Owners	Katrina Moskawitz, Hollywood Boosters	Workers have limited local services.	Compatible uses with existing business, amenities for office workers, traffic management.	Secondary	Emails, letters	Separate Meeting
Developer	Tom Bates, Dick Bernard, Big Sky Development	Last development proposal failed.	Economic and market feasible plan.	Primary	Email, phone	Daily Team Meetings and Reviews

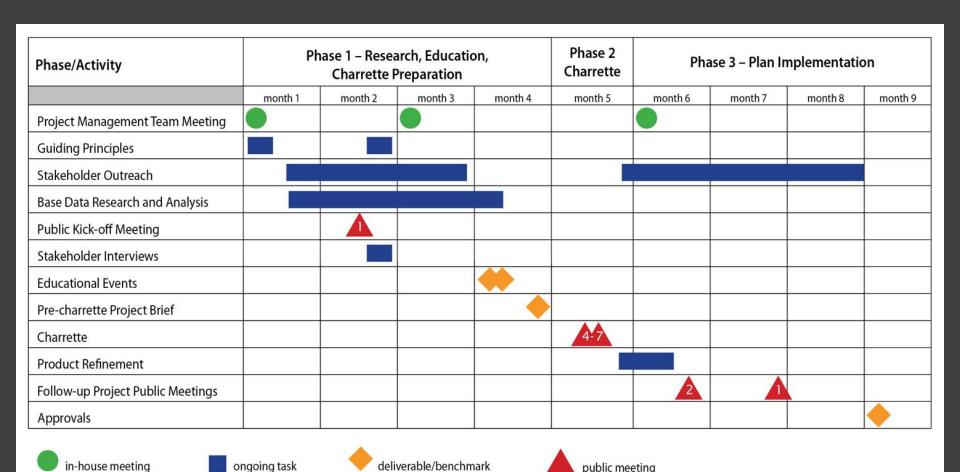
## Charrette System Road Map

Tool: Charrette System Road Map

Purpose: Identify the timing of the major events that occur during the three Charrette System phases of the project.

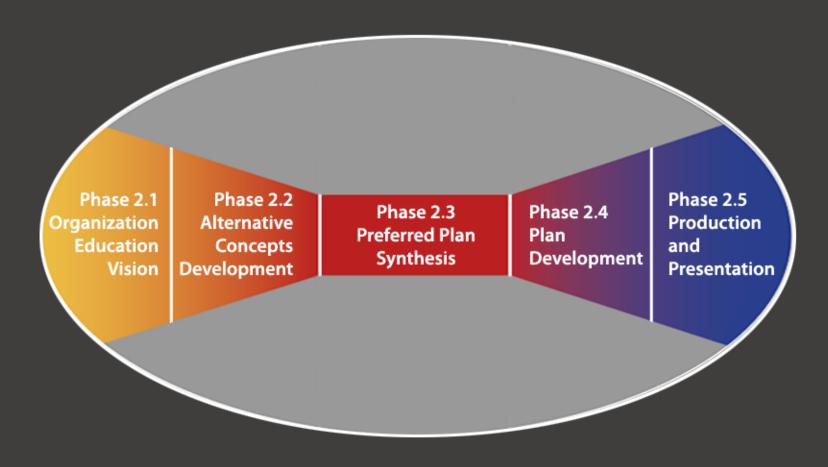
Process: Completed either in the team organizational meeting or by the charrette manager in consultation with team members

### Charrette System Road Map



## **Charrette Scheduling**

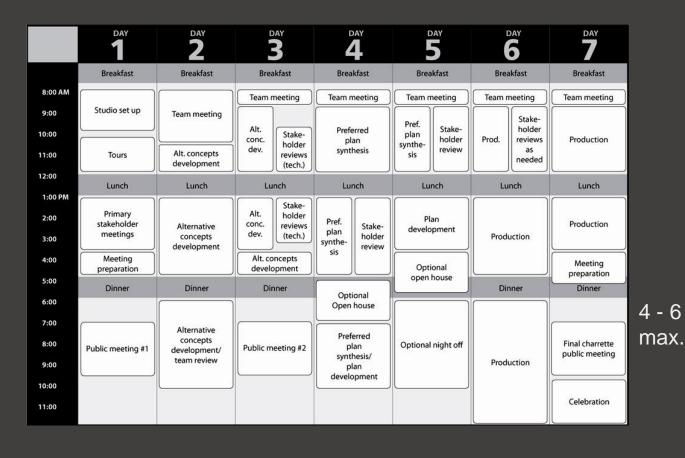
#### The Five Phases of the Charrette

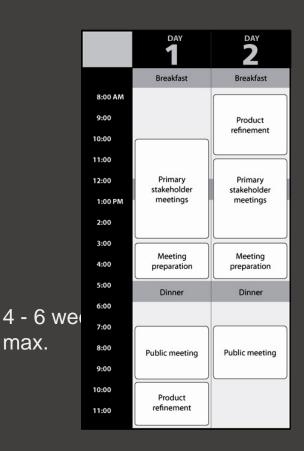


# Charrette Stakeholder Meetings

	DAY	<b>2</b>	B DAY	<b>4</b>	5	DAY 6	DAY 7
	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast	Breakfast
8:00 AM			Team meeting	Team meeting	Team meeting	Team meeting	Team meeting
9:00	Studio set up	Team meeting	Alt.	Preferred	Pref. Stake-	Stake- holder	
10:00	Tours	Alt. concepts development	conc. dev. Stake holde review (tech	plan synthesis	plan synthe- sis holder review	Prod. reviews as needed	Production
12:0 0 1:00 PM	Lunch	Lunch	Lunch Lunch		Lunch	Lunch	Lunch
2:00 3:00	Primary stakeholder meetings	Alternative concepts development	Alt. conc. dev. Stake	Pref. Stake- plan holder synthe- review	Plan development	Production	Production
4:00	Meeting preparation		Alt. concepts development	sis	Optional open house		Meeting preparation
5:00	Dinner	Dinner	Dinner	Optional	open nouse	Dinner	Dinner
6:00				Open house			
7:00 8:00 9:00	Public meeting #1	Alternative concepts development/ team review	Public meeting #	Preferred plan synthesis/ plan development	Optional night off	Production	Final charrette public meeting
10:0 0 11:00							Celebration

# 7-Day Charrette Schedule: For complex projects





Charrette begins with input session, then design begins

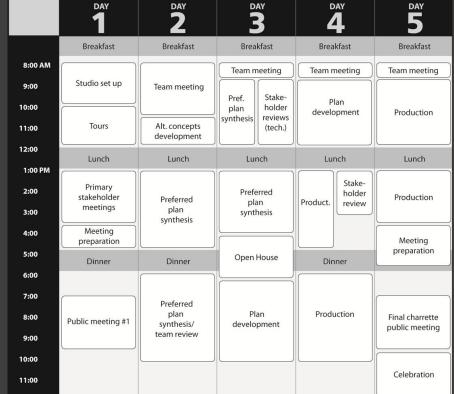
Review & Revise

Final Review

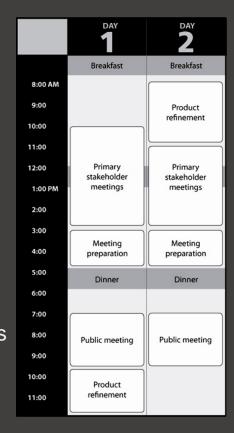
# 5-Day Charrette Schedule: For moderate complexity



4 - 6 weeks max.



4 - 6 weeks max.



Kick-off public meeting (optional)

Create alternative designs

Charrette begins with alternative designs

Review & Revise

Final Review

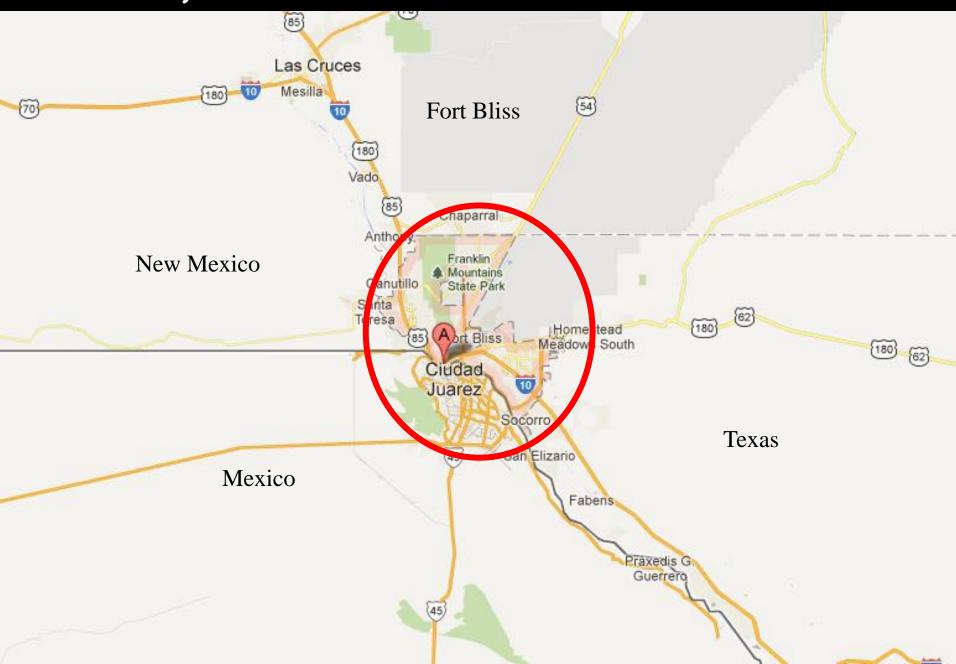
# NCI Collaborative Design System

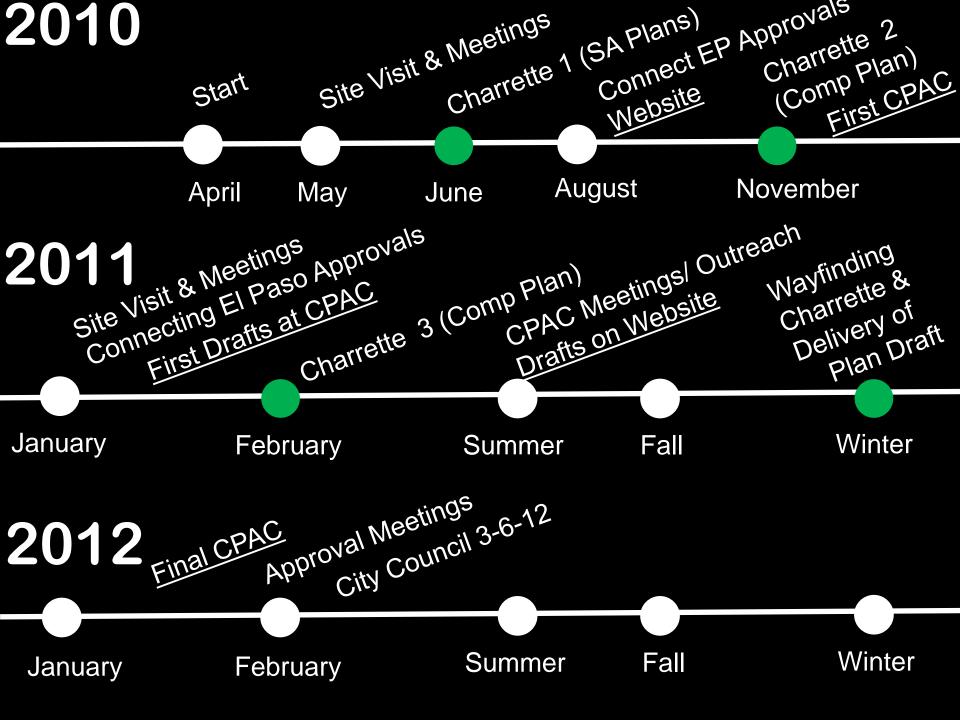
	Project Complexity				Design Process Options	
	Budget	Time	Design	Politics		Days
more complex	1-3	3-5	3-5	3-5	1 2 3 4 5 6 7 1	7•1
	1-3	3-5	3-4	2-4		1.5.1
	3-5	2-4	1-3	1-2		2 • 3 • 2
less complex	4-5	1-3	1-3	1-2		1.3.1
3.	Scale 1-5, 1= low complexity, 5= high complexity				public meetings technical or secondary stakeholder meetings	

# El Paso, Texas

- Mid-size city with over 500,000 people
- Included Juarez, Mexico and New Mexico
- Comprehensive Plan project, adopted 2012
- 3 Fourteen day charrettes (not counting travel)
- 11 Hands-on Design Sessions
- Dover, Kohl & Partners, lead consultant

# El Paso, Texas





### **Charrette Roles and Process**

#### **Charrette Team**

 The multidisciplinary charrette team works uninterrupted to produce the plan at the charrette studio





### **Charrette Roles and Process**

#### The Stakeholder's Role

- Stakeholders provide vision, input and review at key moments during scheduled and impromptu, meetings
- They are not there all the time!



Stakeholder meeting (Scheduled)



Public meetings (Scheduled)



Drop by the studio (Unscheduled)

# Charrette Work Cycles



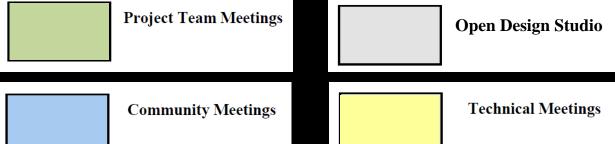
alternative concepts

preferred plan

plan development

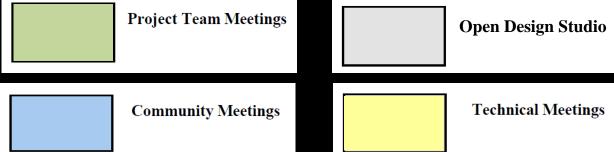
# El Paso Charrette Schedule (days 1-7)

		1					
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
	3-Nov	4-Nov	5-Nov	6-Nov	****	8-Nov	9-Nov
	Wednesday	Thursday	Friday	Saturday	Sun	Monday	Tuesday
time	SITE TOUR	KICK OFF	DESIGN	HANDS-ON		DESIGN	DESIGN
8:00 AM	Breakfast	Breakfast	Breakfast	Capilliaine Oriofina		Breakfast	Breakfast
	Depart Hotel	Depart Hotel	Depart Hotel	Facilitator Briefing		Depart Hotel	Depart Hotel
9:00 AM			CPAC Kick-off and Hands-				Plan Design
10:00 AM 11:00 AM	Site Tour A	Studio Set-up / Design	on Session: Design Studio 9:00-12:00	Hands-on Design Session: El Dorado HS 9:00-1:00		Plan Design	Tentative Children's Charrette: School A
12:00 PM	Lunch out	Rotary Presentation	Lunch in			Tentative Walkability Audit	Lunch In
1:00 PM 2:00 PM	Site Tour B	Plan Design	Plan Design	Synthesis Plan Plan Design	DAY OFF		
3:00 PM 4:00 PM	Site Tour B		ITE Manual Transportation Training			Plan Design Rendering Thumbnalis	Plan Design Rendering Thumbnalis
5:00 PM			•				
	Studio Set-up and		Plan Design				
6:00 PM	unpacking	Kick-off Presentation: Bel Air HS 5:30-8:00	1	Pin-up		Pin-up	
7:00 PM	Dinner out	A1110 0.000.00	Dinner out	Dinner out		Dinner out	Dinner in
8:00 PM							



# El Paso Charrette Schedule (days 8-14)

	Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
	10-Nov	11-Nov	12-Nov	13-Nov	****	15-Nov	16-Nov
	Wednesday	Thursday	Friday	Saturday	Sund	Monday	Tuesday
time	HANDS-ON	DESIGN	DESIGN	OPEN HOUSE/ DESIGN		DESIGN	WORK-IN PROGRESS
8:00 AM	Breakfast	Breakfast	Breakfast	Breakfast	† †	Breakfast	Breakfast
	Depart Hotel	Depart Hotel	Depart Hotel	Depart Hotel	1	Depart Hotel	Depart Hotel
9:00 AM	Plan Design Rendering Linework	Synthesis Plan		Scan Linework		Scan Plans	Comp Plan Advisory Meeting
10:00 AM	Tentative Children's	Plan Design	Final Linework	Print on Vellum		Photoshop Plans	9:00 - 11:00
11:00 AM	Charrette: School B	Rendering Linework		Final Color		Diagrams	Presentation Prep
12:00 PM	Lunch in	Lunch in	Lunch in	Lunch in		Lunch in	Lunch in
1:00 PM	Plan Design	Plan Design					
2:00 PM 3:00 PM 4:00 PM	Tentative OSAB Meeting	City Plan Commission Meeting	Final Linework	Open House: Design Studio 1:00-5:00	DAY OF	Photoshop Plans Diagrams	Presentation Prep ALL SLIDES DUE BY 2:00
	Plan Design	Plan Design				•	
5:00 PM	Renderings Linework	Rendering Linework					
6:00 PM	Mands-on Design Session: -Ysleta HS 5:30 - 8:00	n Session: Flamente Due		Final Color			Work-In-Progress: Riverside HS 5:30-8:00
7:00 PM	i oleta (15 - 5.30 - 6.00	Pin-up / Dinner in	Pin-up / Dinner in	Dinner in		Dinner in	Triverside no 5.50-0.00
8:00 PM					[ ]	Design	



# day 1: charrette touring









Photographing, measuring, walking, driving, biking, riding...

# day 2: kick-off presentation

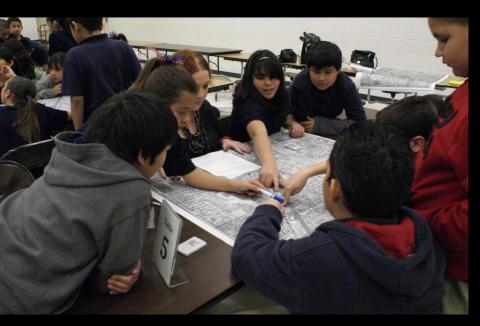




# day 4: hands-on session 1









Central, Northwest, Northeast, Moye Elementary, Fort Bliss

# day 4: hands-on session 1







# Comprehensive Plan Elements

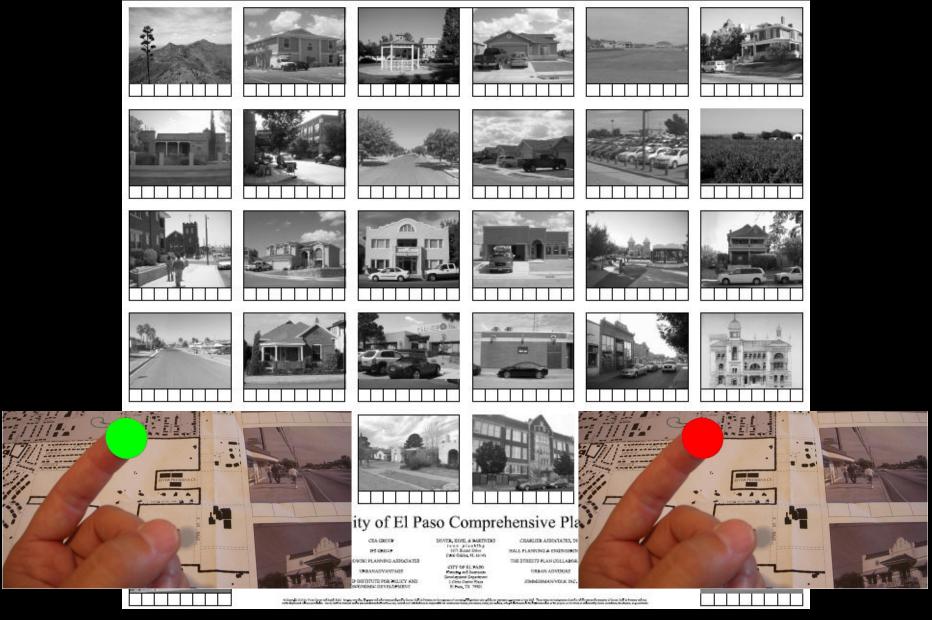
- 1. Land Use and Community Planning
- 2. Urban Design and Community Character
- 3. Historic Preservation
- 4. Economic Development
- 5. Housing
- 6. Transportation
- 7. Health
- 8. Sustainability
- 9. Infrastructure
- 10. Public Facilities and Services
- 11.International Coordination
- 12. Fort Bliss Relations

## Visual Preference Survey

Place a green dot below the photos of places that you like and write down why

Place a red dot below the photos of places that you dislike and write down why

#### **Exercise 1: Community Image Survey**



Quality and character of public spaces, neighborhoods, streetscapes





1. Land Use and Community Planning

# Where should East El Paso's new residents settle?

125,000 new residents by 2030
60 acres/dot x 12 units/acre = 720 units/dot
720 units/dot x 2.7 people/unit = 2,000 people/dot (avg)
2,000 people/dot x 62.5 dots = 125,000 people
6 dots/person x 10 people/table = 60 dots



2. Urban Design and Community Character

# Addressed in the Visual Preference Survey



3. Historic Preservation

What areas have historic significance and special character?



4. Economic Development

Where should public investment be prioritized?



5. Housing

Where would you prefer to live, if you could live anywhere in East El Paso?



6. Transportation

What is your preferred transit route? (bus, trolley or train)



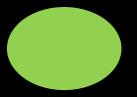
#### 7. Health

Identify healthy neighborhoods on the map. What makes them healthy?



8. Sustainability

Identify locations for open space preservation as well as walking and biking trails.



#### 9. Infrastructure

Identify locations in need of infrastructure upgrades. (flooding, power outages)

10. Public Facilites and Services

Where should new schools, libraries, parks, fire stations and police stations be located?



11. International Coordination

Identify ways to coordinate with Juarez, in particular in areas along the border.



































































#### City of El Paso Comprehensive Plan

CEA GROUP 1PS GROUP

SPECOWEKLPLANNING ASSOCIATES

CHRANADYANTAGE

ETEPINSTITUTE FOR POLICY AND ECONOMIC DEVELOPMENT

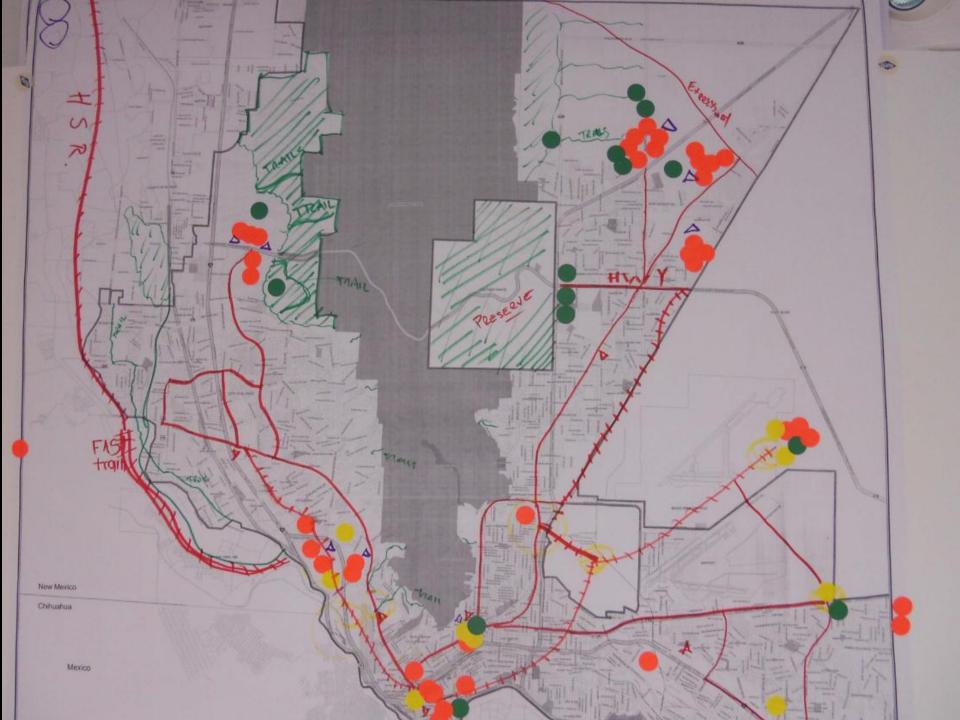
DOVER, KONL & PARTNERS THE A PLANTING 1371 Samer Drive Cond Cables, FL 13141

CITY OF EL PASO Planning and Goodwan Orientapeant Reportures 2 Cris Conter Plans 12 Page TX 19901 CHARLIER ASSOCIATISLING.
HALL PLANSING & ENGINEERING, INC.

THE STREETS PLAN COLLABORATIVE
CRITIAN ADVISORS
ZIMMERMANVOEK INC.







days 7 & 8: children's hands-on sessions



days 7 & 8: children's hands-on sessions



### day 8: hands-on design session 2









### day 10: Fort Bliss hands-on session









#### one-word cards and surveys

			_
P	lяn	$\mathbf{E}\mathbf{L}$	Paso

Thank you for your help and your ideas. Please leave this at the sign-in table or hand it to a Dover-Kohl team member

1. Do you live or work I



Ne ther

If so, for how long? 12 150 125

2. Of the many ideas you heard today, which ones seem the most exciting?

Connectivity potential for non-outer-based

ONE WORD that describes EL PASO:

IN THE FUTURE:

(in my vision)

d/or surrounding areas? (for example: parks, mixed-use neighborhoods, enteres, "green" industries) generated naturatry. River Penergy. Mixed-use semant

 $\H=$ es do you think are missing in El Paso that you would you like to see incorporated

ar should the ASARCO site have in the future? What role should this area play in

LOCAL HIGITARIC. lak it could be a learning site for all its historic thions. It could also be our first venture into inhive transportation.

3 & Suggestions (continue on back if necessary)

# 120+ cards &

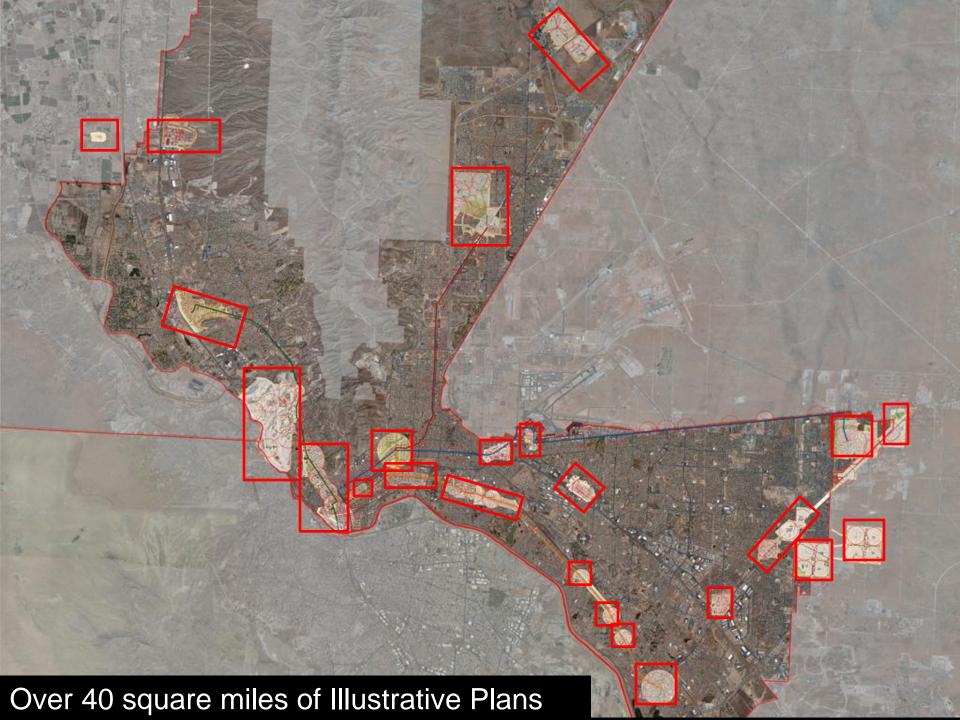
### days 6 – 13: open design studio











Northgate



a closer view of the mall, soon to be demolished

#### 'Downtown' Northgate



mall property reformatted

#### northgate transfer center & TOD



## days 3 – 12: technical meetings



northgate transfer center & TOD



#### 45+ stakeholder meetings

Paso Del Norte Health	Chamber of Commerce	
TxDOT	Open Space Advisory Board	
Neighborhood Associations	Ysleta Pueblo Comm Foundation	
Bicycle Clubs	Sun Metro	

# Bicycle Clubs Sun Metro Econ Dev Corporations Local Developers

Save the Valley

Juarez Planners

Texas General Land Office

Comp Plan Advisory Committee

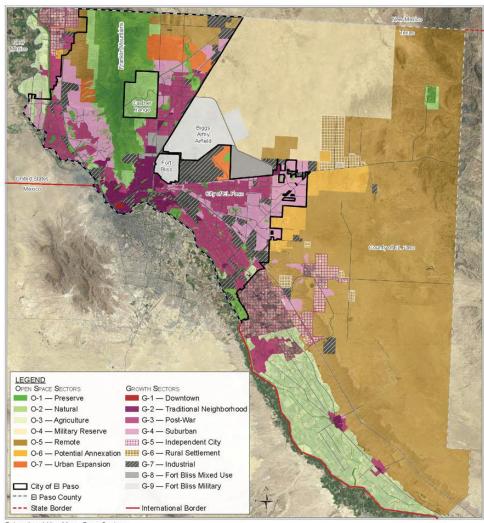
Texas General Land Office Comp Plan Advisory Committee

City Staff Historic Preservation Office

Fort Bliss Safety Officials

#### future land use map for the region

PLAN EL PASO
Strategies for Addressing Community Concerns



Future Land Use Map - Base Sectors

Note: Under Texas law, a comprehensive plan shall not constitute zoning regulations or establish zoning district boundaries.

#### bus rapid transit for entire city



#### articles about & inspired by the process

Opinion

Sunday, Feb. 13, 2011

#### City manager explains Smart Growth

By Joyce Wilson GUEST COLUMNIST

How would you build El Paso's next great neighborhood? You might include the things you liked about the place you grew up, the time-

less places you've visited. You might want children in your neighborhood to be able to walk to school, to the cor-

ner store, even the park. And on warm days, you might build so people could walk if they wanted to, because seeing your neighbor might make the trip worth-

This kind of neighborhood, the kind of neighborhood most people would build for themselves, is what planners call a traditional neighborhood; and many exist in El Pa-

Those traditional neighbor-



sign embody the tenets of Smart Growth - and are made legal by the Smart-Code.

Yet there exists a deliberate misrepresentation of Smart Growth - that it means everyone must live in crimeridden high-rise buildings, devoid of parking, and grass, and that these developments would be far more expensive than what our market will

But even the casual citizen planner knows this isn't Smart Growth.

Nevertheless, misconceptions and resistance abound; but the facts are these. The SmartCode and higher density development do not cause

crime research is there a "direct" causal relationship between density and crime.

Crime experts see Community Policing Through Environmental Design (CEPTED). which focuses on the built environment, as a critical component of sprawl repair. Where CEPTED is practiced. local officials have seen crime reductions of between 17 and 76 percent.

These reductions are attributable to Smart Growth-driven design, meaning more

"eyes on the street" as streets are lined with windows, front doors and porches, not garages.

Where front porches give way to shops, the street is met with windows and shade trees instead of gas pumps and parking lots.

Sprawl also increases all

public-safety costs - more police and fire vehicles required to travel longer distances responding to calls, circling cul-de-sac after cul-de-

SmartCode may be different, but that doesn't mean more expensive, because sprawl can also be very expensive.

SmartCode instead focuses on building complete neighborhoods where people can live for a lifetime. Each neighborhood (

ing types, sized hou and more above sho And if \$

en mean f SmartCod New To Mo., a Sm

ment know sign, recei room, two-bath condos sell for \$99,500 and starter homes for \$124,645.

The Village at Port Royal, S.C., which is a military town, first sold homes for \$75,000.

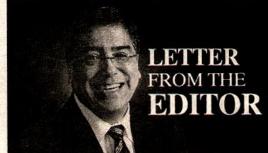
And list price is only one component of true cost, which must include transportation. Because of design, SmartCode neighborhoods induce fewer automobile trips and provide job centers near where people live, making it possible to reduce miles travelled and the

choose to spend their money on groceries or college tuition for their children.

There are proven tax savings as well - narrower, safer streets mean lower maintenance costs.

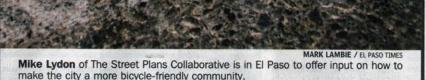
Finally, walkable neighborhoods are healthier and lead to lower obesity and Type II diabetes rates.

As part of the city's new Comprehensive Plan, you have the opportunity to plan great neighborhoods, because



### Growth of El Paso on right track

The newspaper's voice on the opinion pages this morning ad-



Fla. firm helps city be bike-friendly

project total to date:

2,850+ studio visitors, meeting attendees, hands-on participants

#### online presence

#### EL PASO







ABOUT

SUGGESTION MAP

PLANS& PHOTOS

CONNECTING EL PASO REPORT

CHANGEOVERTIME

**NEWS&INFO** 

6,000+ visitors

#### Latest Press

2-15-2011. Plan El Paso: Project of the Month. Urban Lovers Newsletter: A Vision of Europe

2-12-2011, Residents Plan El Paso's Future, KFOX14 News.

2-12-2011. Chris Lopez: Growth of El Paso on right track, El Paso Times

2-03-2011, Bus Plan: Success Becoming Evident, El Paso Times

1-20-2011. Could El Paso

#### Community Input Sought for El Paso Comprehensive Plan Visit Our Virtual Town Hall

A community driven effort to rewrite the City's Comprehensive Plan is underway, giving the citizens of El Paso the opportunity to decide what the future of the City will look like. The Comprehensive Plan is the City's quiding document to direct capital improvements, evaluate development projects, quide public policy and ensure that the City of El Paso is the city its residents want it to be. The plan identifies goals, objectives and policies that will enhance the City's quality of life, respect its natural environs, and support complementary economic growth and development.

Community Hands-On Design Session Focuses on Northeast El Paso and Fort Bliss

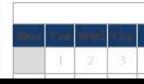
Written on 17 February 2011







#### Upcoming Project



#### virtual town hall



Welcome to Plan El Paso's Virutal Town Hall, an event brought to you by The City of El Paso. We are looking for practical, creative, and implementable ideas on a number of topics and efforts associated with the Comprehensive Plan Update. So submit ideas, provide feedback, and vote for your favorites!

planelpaso.org

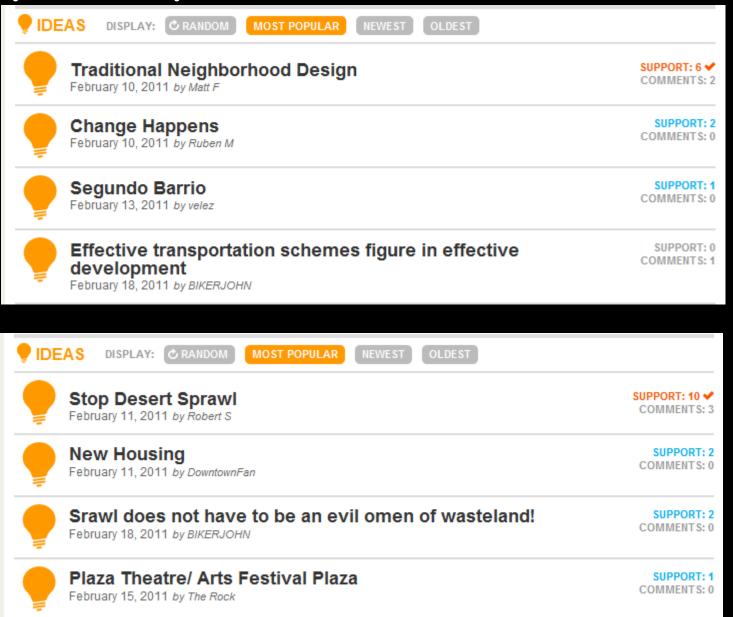
#### **TOPICS**

- Transportation + Public Facilities
- Community Health + Sustainability
- Land Use + Economic Development
- Housing + Neighborhoods
- Urban Design





#### plan el paso - virtual town hall



Many great ideas have been submitted and voted on by other El Pasoans

#### day 14: work-in-progress presentation





