

*a national trust publication*

## How to Organize a Preservation Development Charrette

*by Jennifer Goodman*



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Historic preservation leaders across the country are adapting a traditional architectural design exercise, the charrette, for a fundamental historic preservation objective: finding reuse solutions for threatened historic properties. They have embraced the charrette's central objective, intensive problem solving, and revised its format to address the combined concerns of architecture, real estate development, planning, marketing, and community issues.

*In every successful preservation development charrette, experts gather to evaluate constraints to development and offer recommendations for the reuse or revitalization of threatened buildings.*

This publication will provide a "how-to" kit for planning and implementing a preservation development charrette. Using examples from actual charrettes held in Boston, Philadelphia, and Providence, it draws on what those charrette organizers learned and answers questions asked frequently by preservation leaders who are planning their first charrettes or who are adapting design workshops to address broader development concerns.

Although the types of buildings that are the subjects of successful charrettes vary greatly, the principles and designs for a productive program are universal.

In every successful preservation development charrette, experts gather to evaluate constraints to development and offer recommendations for the reuse or revitalization of threatened buildings.

After outlining the development of a charrette and the strengths and weaknesses of this planning and marketing tool, this publication describes the three fundamental components of a charrette project: planning, conducting the charrette itself, and then securing reuse solutions following the event. The charrette planning section describes how to attract sponsors, funding, community participation, and support as well as getting data and experts to analyze the building's reuse potential.

In the examples described in this publication, charrette organizers needed to gain political and financial support from key constituent groups and local government to prevent the demolition of a threatened landmark, in addition to proposing redevelopment solutions. This is often the case with threatened, long-languishing "white elephant" properties.

The primary charrette model described in this publication is a "Cadillac" version with a long lead-time for planning, a substantial budget, and broad-based public outreach. However, a more modest initiative can serve the charrette organizer's goals equally well. Several examples are offered to illustrate this point.

The "dos" and "don'ts" for a productive charrette session, along with several how-to lists, are outlined in the second sec-

tion of the publication. The final section emphasizes marketing and promotional strategies and offers examples of varied charrette outcomes.

## Charrette History and Development

The Ecole des Beaux-Arts in Paris provides today's charrette organizers with its French term and its basic principles. As described in the monograph *En Charrette/On Deadline* (1993), students studying architecture at the Ecole worked in studios or *ateliers* located outside the Ecole headed by architects on the school's faculty. When the design problems or *projets* were assigned, the students spent a day making a preliminary sketch or *esquisse* at the school, and then took the project to the *atelier* to finish. When the projects were due, a small wagon or *charrette* was wheeled around to the *ateliers* to collect the large, board-mounted drawings. Legend has it that a student who had not yet finished would leap into the cart with his work and complete it as best he could on the way to school.

Architecture schools in the United States in the 1890s and the first two decades of the 20th century embraced the French school's traditions. At the University of California at Berkeley, for example, students wore smocks and berets and spoke in Ecoles des Beaux-Arts jargon. They had *projets* for which they did *esquisses* and were often *en charrette*, or on deadline.

*Preservation groups can use a preservation development charrette to develop design and reuse proposals for historic properties that are underused, vacant, or threatened with demolition, inappropriate development or ongoing deterioration.*

—Photo courtesy of the Boston Preservation Alliance



*The Boston Preservation Alliance, the City of Boston, and the National Trust Northeast Office held a preservation development charrette in 1990 to revitalize three landmark theaters in Boston. Organizers hoped to convince the current owners to sell, lease, or rehabilitate the structures and to identify new developers and investors. Charrette participants produced a rendering of the theater district that illustrated possible reuse solutions.*

*— Illustrations courtesy of the Boston Preservation Alliance*

Since the 1960s, professional design and planning organizations such as the American Institute of Architects (AIA) and the Urban Land Institute (ULI) have continued to use the word charrette to describe intensive design, planning, and community development workshops. Despite the expanding definition of the term, the principles of problem solving and the tight deadlines tie these programs to the beret-headed students of 100 years ago.

A review of charrettes in the 1980s and 1990s illustrates the popularity of this planning tool and the increasing scope of its application. The Department of Architecture at the University of Washington hosted a charrette on “Pedestrian Pockets” to address suburban sprawl. The AIA organized a charrette for developing housing models for homeless women and children. At Kansas State University, the local AIA chapter sponsored a

24-hour charrette to “inaugurate contemporary meaning for the dormant nuclear silos in the Midwest.” Groups of landscape professionals, preservation organizations, and others have also conducted charrettes to focus on the redesign and revitalization of historic transportation corridors or landscapes and older downtowns or communities.

During the last two decades, the preservation development charrette has emerged as a mechanism for historic preservation groups and preservation-related organizations to develop design and reuse proposals for residential, commercial, institutional, and industrial properties that are under-used, vacant, or threatened with demolition, inappropriate development, or ongoing deterioration. Staff and consultants for these organizations, often together with volunteers, serve as program organizers.

## What Can a Charrette Do?

Above all, a preservation development charrette can identify feasible reuse solutions for an endangered property which may then result in its reuse or revitalization. By bringing together architectural, real estate, planning, political, and community leaders, the charrette can generate new ideas that are both practical and visionary. The charrette and its results can attract new owners, developers, and investors to the building.

The program can create hope and optimism for a positive preservation outcome, change how key decision-makers think about a threatened property, and build public and political support for investment and change.

A charrette can also boost the visibility and strength of the sponsoring organization and the local preservation movement. A charrette will expand contacts for organizers, build the membership or constituent base, and generate publicity for the resource, the organizers, and historic preservation generally. This type of initiative emphasizes preservationists as “do-ers” instead of “stop-ers.”

Although the charrette is a popular and powerful tool, it often does not provide a quick fix. The charrette generates ideas and interest, but is not successful without substantial pre-event program development and outreach as well as post-charrette marketing and promotion. And, even when all of the proper steps are taken, charrettes do not guarantee that long-held views of the owner, community residents, or local elected officials will change. Some of the charrette’s recommendations may run up against insurmountable obstacles.

## Pre-Charrette Activities

A successful charrette will take three to six months of planning. The sponsoring organization must define goals, plan and execute an outreach plan, establish a steering committee, and secure co-sponsors and funding. The organization also needs to prepare background materials for the charrette participants.

### Defining Goals

The revitalization of a threatened landmark or group of buildings is generally the central goal for a preservation development charrette. To meet that goal, program objectives may include defining viable uses, identifying developers, investors, or financing solutions, and creating marketing documents from the charrette results.

A related objective may be to influence both supporters and detractors concerning the central preservation goal. This was the case for a charrette designed to revitalize three landmark theaters in Boston. The theaters were vacant and deteriorating. The long-time owners felt saddled with “white elephants,” and many for-profit and nonprofit developers and investors were not interested in the properties because of previous, failed revitalization plans for the buildings and strong indications that investment patterns had shifted away from the area. Objectives of the charrette included convincing the current owners to sell, lease, or rehabilitate the structures and influencing investors and government officials regarding financial incentives and regulatory concerns.

### Steering Committee

To get the program off to a sound start, the charrette organizers should establish a steering

or advisory committee. Individuals should be selected for their energy and expertise as well as for their affiliations with groups that have an interest in, or expertise with, the threatened building. The advisory committee sets policy and advises the program organizers in the same way a board of directors of a small organization interacts with an executive director. The size of this group ranges from five to fifteen; members may include the following individuals:

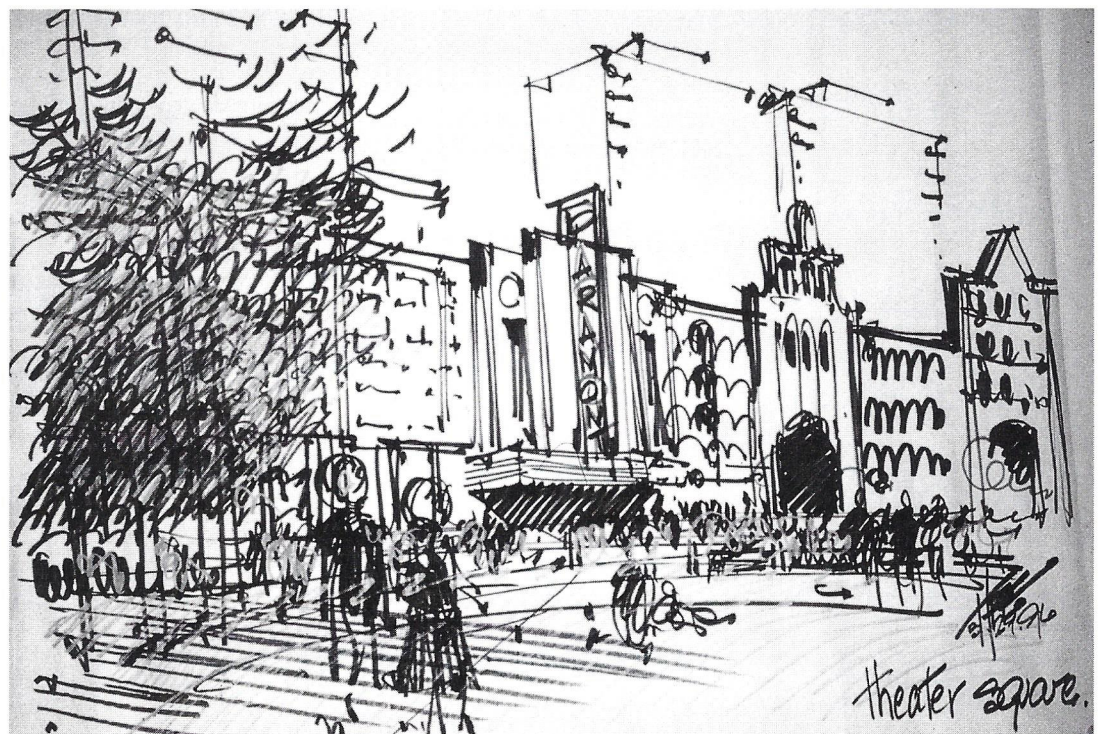
- the property owner(s)
- real estate and preservation planning professionals
- funders
- community representatives
- government representatives of preservation, transportation, economic development, or planning agencies at the local, state, or national levels.

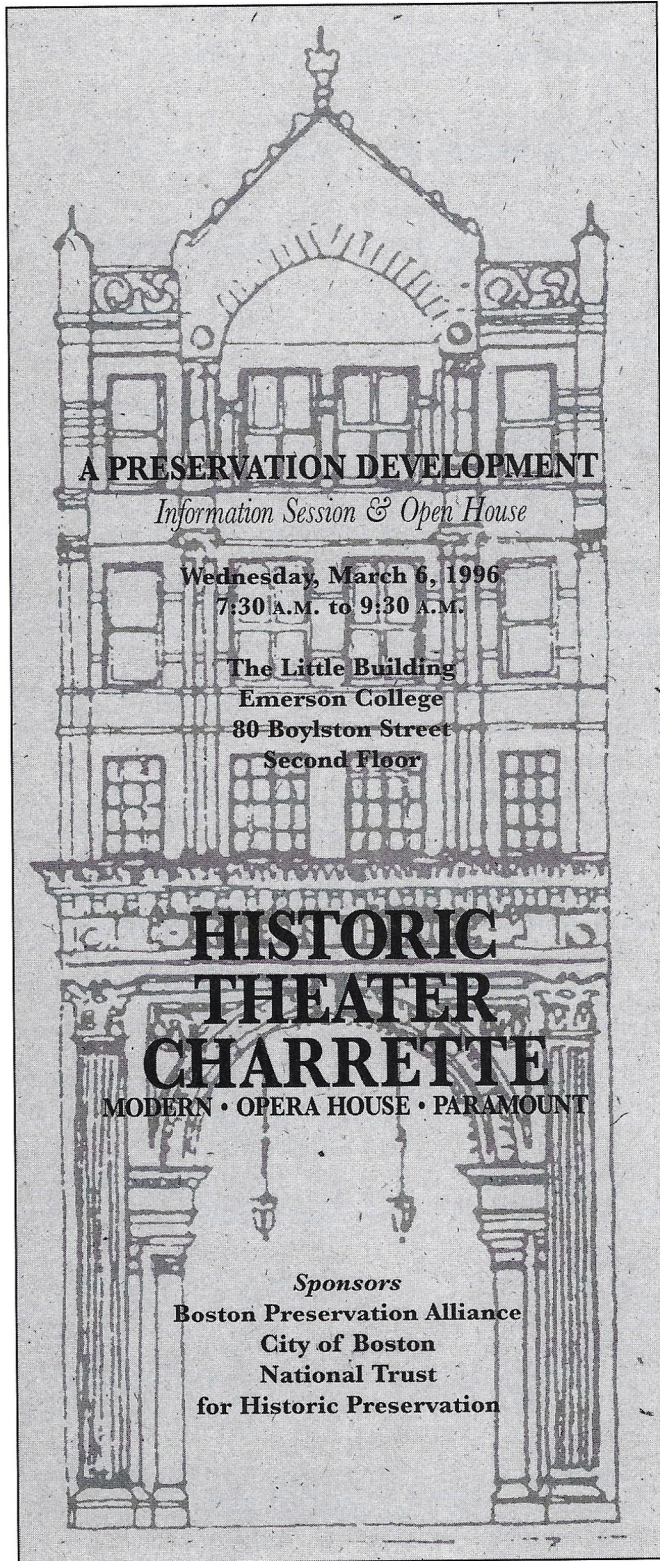
Key tasks of the committee may include shaping the program and its objectives, assisting with budget development and fund

raising, helping organizers select and recruit charrette participants, and assisting with post-charrette marketing and promotion. The committee may establish subcommittees or task forces to handle these functions or additional tasks. Following up on the recommendations from the charrette is extremely important, and it is essential to the success of the charrette that members of the steering committee or one of its subcommittees make the commitment to continue work after the charrette occurs.

### Program Sponsors

Program sponsors can lend credibility and support to the charrette program in the same way that a strong steering committee will. Charrette organizers should consider inviting appropriate agencies or organizations to serve as program sponsors. In many cases, representatives of these groups will be serving on the steering committee. Examples of key partners may include





**A PRESERVATION DEVELOPMENT**  
*Information Session & Open House*

Wednesday, March 6, 1996  
 7:30 A.M. to 9:30 A.M.

**The Little Building**  
 Emerson College  
 80 Boylston Street  
 Second Floor

**HISTORIC  
 THEATER  
 CHARRETTE**  
 MODERN • OPERA HOUSE • PARAMOUNT

*Sponsors*  
**Boston Preservation Alliance  
 City of Boston  
 National Trust  
 for Historic Preservation**

*The charrette budget should include funds for public outreach materials. In-kind donations for the design or printing of promotion materials can help keep expenses low.*

the local planning or economic agency, or professional organizations such as the chamber of commerce or real estate board, or a local chapter of the American Institute of Architects or Urban Land Institute. The Providence Preservation Society recruited the State of Rhode Island, the Rhode Island Foundation, the City of Providence, the Greater Providence Chamber of Commerce, the Providence Foundation, the Scenic Rhode Island Foundation, and the Veteran's Memorial Auditorium Preservation Association as co-sponsors for its Masonic Temple Charrette.

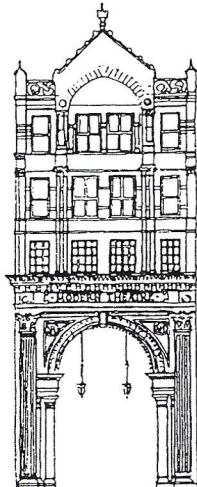
The responsibilities of these sponsors must be clear. What role do they have in decision-making? Are sponsors lending their organization's name, publicizing the charrette, or providing a financial contribution? It is also very important to specify the manner in which they will be credited for their involvement.

For the Boston Historic Theaters Charrette, the city's nonprofit preservation advocacy organization, the City of Boston, and the National Trust for Historic Preservation's Northeast Office served as co-sponsors. The Boston Preservation Alliance

provided workspace for the charrette's staff person and day-to-day activities, and the City of Boston gave substantial assistance through its planning and development authority, landmarks commission, and office of cultural affairs. The National Trust provided national contacts and staff assistance with media relations, and its director co-chaired the steering committee. All three entities lent credibility to the initiative, and each secured approximately one-third of the program funding.

**Fund Raising: Expenses and Funding Sources**

While the size of the charrette program budget can range from less than \$5,000 to more than \$50,000, the average budget of building-specific charrette programs run by a locally based nonprofit preservation organization is generally in the \$10,000 to \$20,000 range. Charrette organizers report that in-kind services almost double these cash-only budget estimates. It can be extremely productive to discuss with steering committee members possible sources of both funding and in-kind donations.



**BOSTON HISTORIC THEATER CHARRETTE**  
 The Boston Preservation Alliance  
 The City of Boston  
 The National Trust for Historic Preservation

Invite you to a reception for charrette participants and supporters of this revitalization initiative. This event is the kickoff for our one-day workshop and a part of our effort to secure the future of the Paramount, Opera House and Modern Theaters

Thursday, March 28, 5:30 - 8 p.m.  
 The Swissotel  
 One Avenue de Lafayette

At 5:30 p.m. charrette participants will tour the neighborhood around the theaters. The tour will begin at the main lobby of the Swissotel

At 6:30 p.m. members of the League of Historic American Theatres will present examples of successful historic theater district developments around the country

To RSVP for the reception, 617-367-2458

Key budget items fall into three basic categories. The first and largest expense is personnel. This budget item should not be under-emphasized because personnel dedicated to program coordination are critical to a program's success. Frequently, a preservation organization will hire a part-time consultant to serve as program coordinator. Additional, dedicated staff time or a consultant may be required for development analysis, a condition assessment, or public relations. At times these services may be donated or paid for by a program sponsor or participant such as the property owner or a local redevelopment agency.

The second category of budget items relates to the production and distribution of materials: packets for charrette attendees, public outreach materials and the post-charrette outcome report, and marketing materials. Expenses for printed materials include design, printing, and postage. Media-related costs, web-site work, T-shirts, or other promotional products should also be considered.

Other charrette expenses relate to producing the actual event. Costs may include site and equipment rental and food and beverages. The budget may also include travel costs for out-of-town experts to attend the charrette, or funds so that key charrette participants can travel to meet with successful developers of out-of-town projects that are similar to the charrette subject.

There are several potential sources of funds for a charrette. Private foundations are often interested in supporting a charrette because it is solution-oriented and involves a high level of community outreach and volunteerism. Forming a coalition

of several organizations may increase the probability of attracting regional or national foundation funding.

Corporate foundations and businesses may provide funds for a charrette because of the public visibility of the charrette process and the expectation of a successful outcome that may improve the economic vitality or quality of life in the community where the corporation has a business interest. Specific types of companies to approach include those involved in the construction, design, or development industries. They may understand and support the charrette concept more readily than other types of businesses. They may also see their investment in the program as a catalyst for redevelopment that might create future work for their company.

Even if companies cannot, or will not, provide a cash donation, they may be willing to donate in-kind services. For example, an architecture firm may perform a conditions assessment for the target building and prepare a report for use at the charrette. A real estate development company may offer valuable development analysis for the building or analysis of local market conditions. In addition, a class at an area college or university may provide research, architectural drawings, or other types of assistance. Ask a local public relations specialist if he or she will agree to develop a communications plan, offer assistance in cultivating media contacts, or help with the media component of events. In some cases, it will also be appropriate to ask the property owner for a cash or in-kind contribution.

### ***Outreach to Prospective Stakeholders***

As stated earlier, outreach to stakeholders and opinion-makers is the common thread that runs through the whole charrette process. Once charrette organizers have identified key contacts, established a steering committee, and undertaken fund-raising activities, they should continue an aggressive outreach program through informal and formal means. There are three main goals. The first is to gather opinions and background information. The second is to encourage participation by interested individuals and groups to help organize the charrette, participate in the event, or advocate for solutions. The third is to convince the unconvinced.

There are many approaches to this phase of community outreach. Charrette organizers should consider whom they need to reach and design a program that meets specific needs and objectives. Meetings with appropriate elected officials or key representatives of professional or community organizations, public presentations to local agencies or other groups, and an "open house" to discuss the threatened property and the charrette's objectives are all effective mechanisms to consider.

In Rhode Island, the Providence Preservation Society held small meetings with representatives of the state agency that owned the threatened Masonic Temple, met with community groups, highlighted the charrette program in its newsletter, and promoted press coverage. In preparation for a charrette in Philadelphia, charrette organizers discussed charrette goals and program development at a monthly meeting with a local "friends" group focused on the

## Sample Budgets

### I. Large-Scale Charrette

#### INCOME

Foundation Grants .....	\$8,000
(\$5,000 and \$3,000 grants)	
Corporate Contributions .....	5,000
(\$2,000 and three \$1,000 donations)	
<i>Donated Services</i>	
Development analysis .....	N/C
Public relations assistance.....	N/C
Site rental .....	N/C
<hr/>	
Total.....	\$13,000

#### EXPENSES

##### Personnel

Program coordinator (part-time for 5 months) .....	\$7,500
Development analysis .....	N/C
Public relations assistance.....	N/C

##### Printing and Postage

Charrette packets .....	200
Invitations to pre-charrette tour and lecture .....	300
Invitations to post-charrette findings presentation .....	1,000
Report (500 copies)	
Design .....	400
Printing .....	2,000

##### Day-of Charrette Expenses

Lunch and refreshments (assuming 50 participants) ..	600
Site rental .....	N/C
Film, supplies .....	200
AV rental .....	400
Travel for out-of-town guests .....	400

Total.....	\$13,000
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### II. Small-Scale Charrette

#### INCOME

Contributions .....	\$3,000
(Corporate, foundation or individual)	
<i>Donated Services</i>	
Development analysis .....	N/C
Public relations assistance.....	N/C
Site rental .....	N/C
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Total.....	\$3,000

#### EXPENSES

##### Personnel

Program coordinator .....	\$1,000
Development analysis .....	N/C
Public relations assistance.....	N/C

##### Printing and Postage

Charrette packets .....	200
Invitations to pre-charrette tour and lecture .....	150
Invitations to post-charrette findings presentation .....	150
Report (500 copies)	
Design .....	N/C
Printing .....	200

##### Day-of Charrette Expenses

Lunch and refreshments (assuming 50 participants) ..	600
Site rental .....	N/C
Film, supplies .....	200
AV rental .....	200

Miscellaneous .....	300
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Total.....	\$3,000
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preservation of Knowlton, a country estate designed by the noted High Victorian architect Frank Furness.

A “mini” or pre-charrette can also boost the productivity of a charrette and formally engage people who may not be included in the actual charrette. To inform design professionals participating in a charrette, the sponsor—the Boston Society of Architects—held a workshop for community representatives on a Saturday a few weeks before the event to define concerns and goals for the architects. The Providence Preservation Society invited individuals and groups that were not involved in the charrette to submit written reuse proposals before the event. This attempt to be inclusive and generate the best ideas possible was praised in an opinion piece and an editorial that ran in the city’s major daily newspapers before the charrette.

Outreach to the media is particularly important. During the program’s development and certainly before the charrette itself, charrette organizers should communicate with print, television, and radio contacts. The sponsoring organization should send out news releases about public outreach events, tours, and the charrette itself. The organization should contact editorial boards, news reporters, and architectural or planning critics.

The message to the media should clearly express the need for the charrette and the economic and social benefits of revitalizing the property. Charrette organizers must focus the media’s attention on the expertise that will be brought to bear for problem solving and the program’s realistic objectives. If possible, point to other local examples of successful charrettes.

Often steering committees struggle with whether or not to invite members of the media to the actual charrette. Gaining coverage for the event and the experts’ interest in saving the threatened building are very positive factors. On the other hand, sponsors worry that the presence of the media will make charrette participants cautious about what they say or that the media will emphasize negative comments which will dampen the public or development community’s enthusiasm for the building’s revitalization. One solution is to invite a small group of media representatives to the final presentations at the charrette and make sure that they are well briefed by program leaders. Another possibility is to exclude the media from the charrette and set up a press announcement or meetings with key media members immediately following the charrette.

If this is your organization’s first charrette, be sure to talk with other groups that have led and participated in similar programs. Their feedback may give you some useful models and a sense of how the charrette concept will be received in your area.

### ***Preparing Charrette Materials***

As the charrette organizers lay the foundation of public support for the charrette and its outcomes, they must generate background materials. These materials not only inform charrette participants, but they also become the framework for the post-charrette outcomes report and marketing package for the historic building.

The following items should be collected and compiled to create an easy-to-use reference document for charrette participants. These materials give charrette participants the data they need

to do their work at the charrette and make informed recommendations. Materials include:

#### **Site profile**

- Plan, parcel size
- Location description and map

#### **Property profile**

- Ownership
- History of use
- Current zoning and other land use guidelines or restrictions
- Construction materials
- Plans and elevations (preferably measured drawings at an easy-to-use scale)
- Other visual images of the property

- Gross and net square footages and room sizes
- Existing conditions report
- Cost estimates for stabilization or rehabilitation
- Taxes and assessed value

#### **Historic preservation data**

- Physical description
- Description of property’s architectural and historic significance
- Construction and alterations dates
- Architect/builder
- Landmark status, preservation restrictions, and available financial incentives

#### **Context information**

- Data on adjacent community’s demographics and real estate market
- Data on existing and planned transportation
- Other information relative to development scenarios

#### **Development data**

- Descriptions or copies of materials on past redevelopment efforts
- Information on other recent preservation projects with similar redevelopment scenarios
- Current market analysis related to redevelopment scenarios

#### **Community Findings**

- Descriptions of reuse preferences and concerns

*During the program’s development and certainly before the charrette itself, charrette organizers should communicate with print, television, and radio contacts.*





*Charrette teams need to be big enough to include the necessary types of interests and expertise, but small enough to be efficient and productive.*

*—Photo courtesy of the Boston Preservation Alliance*

### **Creating Teams**

The types of teams formed for the charrette should relate to the possible redevelopment scenarios (described below) and reflect the kinds of expertise needed. Team members should be active and well-connected people who are able to work well in groups. Every team must include specialists in areas of possible reuse.

The ideal team is composed of the following individuals:

- Architects/designers
- Real estate development and marketing professionals
- Planners and preservationists
- Government sector representatives
- Community representatives
- Lenders
- Philanthropic representatives
- Construction estimators
- Specialists in the proposed reuse scenario

Charrette organizers often find that top executives, who may have rejected board or committee seats or participation in fund-raising or special events, will partici-

pate in a charrette. They will agree to roll up their sleeves with their peers when the program is significant, expectations are positive and realistic, and they are being asked to volunteer for a short, defined amount of time.

Each team should include a good facilitator serving as the team leader, a real estate specialist, a financial analyst, and a scribe and a reporter to record and present the team's findings. If charrette organizers cannot recruit enough people with a certain type of expertise, they can create an effective "roving" system, with these experts circulating between the teams.

The size of a team may range from 8 to 12 people. Each group needs to be big enough to include the necessary types of interests and expertise, but small enough to be efficient and productive. Convening team leaders before the charrette to review best practices for team facilitation, the development scenarios, and desired program outcomes is strongly encouraged.

### **Problem Statement**

Charrette organizers must craft a problem statement for the charrette that relates broadly to the overall program goals and specifically to the products they want to see at the end of the day. Start with constraints and end with needs. For example:

#### **Recognizing**

- that the Brown Commercial Block is a National Historic Landmark;
- that the projected redevelopment cost may approach \$120/square foot; and
- that parking appears limited on or near the site

#### **Create**

- Development, preservation, and marketing solutions that are financially and physically feasible to revitalize the Brown Commercial Block.

This problem statement will then be refined further and will relate directly to redevelopment scenarios and guidelines described below.

### **Redevelopment Scenarios and Guidelines**

Redevelopment scenarios and redevelopment guidelines for charrette teams give participants an appropriate level of direction based on background research and the stakeholders' expectations. Charrette organizers should create options based on likely uses that have surfaced during discussions with leaders in the development sector and community representatives, and during the preparation of background materials. Traditionally, each team is given a specific use to test as a redevelopment scenario in addition to the broad problem statement. Team # 1, for example, may be asked, "Is a residential use viable for this building? What will it take to make a resi-

dential use work?" Team #2 may be assigned a commercial and residential mix, team #3 may be asked to consider commercial activity only, and team #4 may be assigned institutional uses. There are many variations on this theme. For example, uses may be more narrowly defined, and teams may be given choices such as the arts, hospitality, educational, office/retail, or market-rate residential and subsidized residential uses.

Depending on the number of teams and the number of redevelopment scenarios, charrette organizers sometimes invite two teams to tackle the same scenario so that they can later compare their findings. Or a team may be allowed to identify a use without any assignment. Rules might also include a mid-day deadline to allow a team to discard a use that, once tested, seems very impractical. The team could then continue with a new assignment or its own choice of redevelopment scenario.

Giving each team a set of guiding principles for redevelopment may help them more quickly advance to testing reuse solutions that meet objectives that the steering committee has generated. The steering committee has a more complete knowledge of the owner's interests, community concerns, preservation restrictions and priorities, and market forces—and the time to assess and revise these ideas—than any one team will generally have. Indeed, developing the guidelines offers an important exercise for the steering committee, helping it to make sure that the promoters of this effort share the same basic information and vision of prospective outcomes. Guidelines can be both restrictive and prescriptive.

A charrette designed to identify solutions for Pinebank, a long-vacant and deteriorating Victorian mansion in an Olmsted-designed Boston city park, included the following guidelines:

1. Preserve the architectural integrity of the residence and its surrounding landscape. Additions and new construction strongly discouraged.
2. Limit parking to existing footprint.
3. Encourage public accessibility of landscape and building.

For a charrette developed to find reuses for Knowlton, the Frank Furness-designed estate in northeast Philadelphia, the guidelines established a rating system for the outbuildings based on their architectural significance and integrity and their relationship to the main house and the amount of land available for development. Charrette redevelopment guidelines for the Boston Historic Theater Charrette emphasized determining which of the three theaters' historic interiors were most important to restore or protect.

### **Other Pre-Charrette Activities**

Two other pre-event activities can boost the productivity of a charrette. First, organizers should plan a site visit for participants to the threatened property in addition to providing printed materials and visuals that describe the property. Depending on the scope of the charrette and the accessibility of the historic resource, charrette organizers may conduct a site visit with or without tours of the surrounding area. Charrette organizers frequently hold the tour the day before, or morning of, the charrette. If it is impossible or impractical to tour the building, a visit to the area and a video or slide-show tour of the building is a good alternative. The visit should be scheduled so it is fresh in participants' memories, and the tour should be reinforced with photos, maps, and other visual materials in participants' packets and at the charrette.

Second, organizers should plan a dose of extra inspiration to propel the participants through an intense day of work. One possibility is a presentation of successful

*In addition to providing printed materials and visuals that describe the building, organizers should plan a site visit for participants to the threatened property. In Providence R.I., team members tour the Masonic Temple before the development charrette.*

*— Photo courtesy of Providence Preservation Society*



## Sample Day-of-Charrette Schedule

### 8:00-8:30 a.m. Registration

- Welcome people individually
- Reiterate team assignments
- Introduce people to each other
- Hand out any last-minute information
- Offer refreshments

### 8:30-9:00 a.m. Welcome to the group

- Introduce organizers
- Thank sponsors and display their names on a signboard or other highly visible manner in the group gathering space(s)
- Give brief review of problem statement, goals, schedule, and meeting etiquette for teams

### 9:00-10:00 a.m. Tour

(Note: day-of-charrette tour is most efficient when the event is held in or adjacent to the property that is the subject of the charrette)

- Offer views of major spaces, overall condition, and property's context
- Review historic significance and features that relate to redevelopment guidelines

### 10:00 a.m.-12:30 p.m. Team Work

- Make introductions noting each participant's expertise and affiliations
- Designate a scribe and end-of-day presenter(s)
- Set a clear agenda
- Review redevelopment guidelines
- Plan way to approach problem
- Work with scenario

### 12:30-2:30 p.m. Working Lunch and More Team Work

- Continue to work with scenario
- Revisit redevelopment guidelines and scenario as needed
- Respond to problem with as much detail as possible
- Plan presentation with graphics

### 2:30-2:45 p.m. Break

### 2:45-3:45 p.m. End-of-Day Presentations

- Present team findings to group
- Organizers give closing remarks to thank sponsors and participants, draw conclusions from the teams' presentations, and state clearly what next steps will be

redevelopment solutions for similar properties, perhaps by an out-of-town expert. For example, representatives from the League of Historic American Theaters who were participating in the Boston Historic Theater Charrette presented concise case studies of successful theater district developments in cities with demographics similar to those of Boston. Charrette participants and supporters attended this event and a tour on the evening before the charrette.

## Day-of-Charrette Activities

After weeks and months of planning, the charrette day arrives. It is arguably the single most important day of a long process. A good schedule and attention to details, combined with the rich background materials and strong teams, will help the participants generate significant findings.

### Logistics

The following day-of-charrette checklist will help you prepare for both expected and unexpected developments:

#### For Tour

- Tour leaders
- Hardhats
- Flashlights
- Release forms, if needed

#### For Registration

- Staff for registration
- Registration list
- Team assignment list
- Name tags
- Last-minute instructions
- Extra packets

#### For Public Relations and General Communication

- Designated spokesperson and designated press liaison
- Press kits
- Photographer and photo supplies to document event

- Tape or video for recording group presentations
- AV projector, screen, easels with large note pads, or other equipment for presenters
- T-shirts or other thank-you mementos for participants
- Portable or accessible telephone

#### For Charrette Teams

- Instructions and any last minute, additional background information for team leaders
- Extra copies of charrette information packet
- Contact information regarding roving experts
- Copies of plans, elevations, and other graphic representations of the property for team brainstorming and presentation
- Directions regarding team presentations and report
- Laptop or accessible computer for note-taking, pro forma analysis, or presentation
- Calculator

#### Refreshments

- Designated catering contact person
- Meals, drinks, and snacks
- Paper products, trash bags, and other items

#### Schedule

The majority of the day (60-75 percent of the time allotted) should be given to teamwork, to maximize the effectiveness of the assembled experts. The start-up session provides a vital opportunity to set a clear agenda. Review the problem statement and charrette goals as well as the schedule and rules for the day. At the end of the day, all participants should gather and representatives of each team should give oral presentations enhanced by graphics. Organizers need to offer closing remarks highlighting the common themes and issues that need more clarification. Draw some

preliminary conclusions about which solutions take priority and describe the next steps in the charrette program process.

Vats of strong coffee and rolls of tracing paper—common elements of architectural design charrettes—are “must-haves” at a preservation development charrette. Guest critics, prizes, or other features of design charrettes are possibilities and may be adapted, with care. Guest critics may attract media attention, provide stimulating commentary at the final presentations, and lend credibility to the venture. Competition or prizes may also stimulate participants and add humor or drama to the final presentations. Make sure, however, that guest critics or competitors stay on point and add to the cultivation of the team’s ideas instead of detracting from clear outcomes.

How much information organizers bring to the charrette, who is present, and how much time the teams are given to produce findings directly affect how much the organizers can expect to accomplish. The charrette should, however, yield the following products and results:

1. recommendations from the teams regarding reuse solutions and redevelopment strategies,
2. shared visions and disparate views that require additional analysis,
3. oral presentations, written documentation, and drawings or other visual representations of solutions, and
4. support for redevelopment.

### Post-Event: Securing Solutions

After a big event and months of program development, charrette organizers will need to resist the urge to take a break from the program and focus on other things.

Except in the rare case when an immediate solution is revealed by the charrette, the charrette results must be effectively distributed, marketed, and promoted. “After the charrette event,” warns Arnold Robinson, former executive director of the Providence Preservation Society, “is when the work begins.” Post-event activities include 1) immediate follow-up tasks related to the event, 2) preparation of the charrette report, and 3) aggressive marketing and promotion planning and implementation. Robinson’s warning cannot be overemphasized.

### Immediate Follow-up Tasks

In the week following the charrette, organizers should thank everyone involved in the event including charrette participants, elected and appointed officials, sponsors, and funders. Send a description of the charrette day and convey the preliminary results and what comes next. Remind your team leaders and scribes when their team reports are due if they have not already been collected.

Similarly, organizers should contact key media outlets and circulate media releases with this information in a manner that fits the program’s strategic goals. The Providence Preservation Society held a press conference on the Monday after a Saturday charrette on the front steps of the Masonic Temple, their subject, to gain attention and spread their news. Other organizers focus on following up with media representatives who were present at the charrette, and also contacting editorial boards with information on when the recommendations will be released. Be sure to thank media representatives who have been particularly interested or helpful.

## Sample Charrette Program Schedule

### Pre-Charrette Schedule

#### Six months before

- Establish work plan, schedule, and budget
- Secure personnel
- Identify major stakeholders
- Establish steering committee
- Create a standardized corporate image for charrette communications

#### Five months

- Invite co-sponsors
- Refine outreach plan
- Secure funding and in-kind commitments

#### Four months

- Gather and develop background materials for charrette
- Check condition and availability of property for tour
- Arrange charrette meeting site

#### Three months

- Develop list of prospective charrette participants
- Continue outreach

#### Two months

- Invite charrette participants

#### One month

- Compile information for post-charrette report, secure designer and printer

#### Three weeks before

- Send charrette packets to participants

#### Two weeks before

- Get team leaders together
- Assemble resource library for charrette
- Finalize team assignments
- Conduct site visits to property and charrette site

### Post-Charrette Schedule

#### One week after

- Thank participants, supporters, and funders
- Contact key media representatives and/or hold a press conference
- Team reports due to organizers

#### Two weeks after

- Convene steering committee to review charrette, reorganize, and create post-charrette strategy
- Draft report to steering committee for review

#### Three weeks after

- Report to printer for production

#### Four weeks after

- Distribute report
- Begin advocacy and marketing activities to promote the best reuse scenarios

FOR THE PROVIDENCE JOURNAL-BULLETIN



Organizers should contact key media outlets and send out press releases with information that fits the program's strategic goals. In Providence, R.I., editorial cartoons drew attention to the uncertain fate of the Masonic Temple.

—Reprinted with permission of Jim Bush

This is also an important time to evaluate the event and the work to date. Revisit the overall goals, budget, and work plan and make any necessary revisions.

Another important task is to plan or confirm arrangements for the next steering committee meeting. Preferably before the charrette day, and certainly immediately following it, the committee's leader should facilitate a frank discussion about the group's future objectives and composition. Subcommittees may need to be realigned for post-charrette tasks. Certain committee members may need to resign, and the group should consider new additions. Prospective new members may include an individual who served as a leader at the charrette or someone with strong expertise or connections related to a priority solution that has emerged through the charrette process. No matter what the composition, it is essential

that an active advisory group continue to guide the charrette organizers following the event to maximize their effectiveness.

### **Charrette Report**

The steering committee or a subcommittee can help guide the creation of a report on charrette findings just as it helped design the charrette and prepare the materials for it. The report should include the following:

• **Profile items that a prospective owner, developers, or investor will want to know.** The report should draw heavily from the material collected for the charrette. Include an easy-to-read chart or lists with technical information such as:

- Property name and address
- Ownership
- Architect/builder
- Construction and alteration dates
- Lot or parcel size
- Use

- Construction materials
- Current zoning and other land use guidelines or restrictions
- Building area, number of stories and other useful measurements
- Assessed value
- Gross tax
- Landmark status or preservation restrictions

• **The report must contain a description of the charrette goals and methodologies.** This information should be at, or near, the front of the document.

• **The data generated by the charrette should be conveyed clearly.** Charrette organizers should refine the raw data to an extent that seems effective. Flesh out feasible solutions with information about potential users, other models, capital budgets and operating cost pro formas, and available incentives or subsidies. A report appendix that lists available sources of funding with short descriptions and contact information can be extremely helpful. Depending on the organizers' goals, conclusions can address non-feasible solutions as well as the feasible solutions.

• **The report should emphasize redevelopment guidelines and principles as much as the actual reuse recommendations.** Most frequently, charrette organizers will revise guidelines prepared for use at the charrette with themes that emerged from the individual team reports. Jeffrey Taylor, director of the New Hampshire Office of State Planning and chair of Plan New Hampshire's Charrette Committee, believes that the guidelines are essential. He notes that conditions related to a property's reuse might change as soon as the charrette participants leave

the meeting place. The real estate market and forces that have an impact on “problem” buildings that are the subjects of charrettes are quite fluid. Investment or disinvestment near the property may occur, local political leadership may shift, or the property owner’s personal or financial situation may change. Redevelopment principles will tend to stay more current and more useful than individual solutions, and will guide any reuse proposal for the property.

The Boston Historic Theater Charrette report contained the following five “guiding principles for change” that related to general planning and organizational issues:

- A Sense of Place Creates Community
- The “Right Mix” of Uses Restores Prosperity
- Development Can Take Many Forms and Have Several Phases
- A Dedicated Leadership Entity Will Bring Focus to the Task
- Special Funding Incentives Drive a Community-wide Effort

The refined redevelopment guidelines from the charrette for Pinebank, a Victorian mansion in an Olmsted-designed park, clarified core preservation and community concerns. They emphasized that the reuse should:

- Address the needs of Jamaica Park and be compatible with existing park programs
- Be contained within the existing footprint of the building
- Limit on-site parking, identify possible off-site parking, and discourage additional vehicular traffic
- Include a public component, such as community meeting rooms, public rest areas, and seating on the terrace
- Seek initial support from a combination of city stabilization funds and private investment

- Use a nonprofit management and development structure as a means to raise additional funds and build creative partnerships
- Generate income to cover annual debt
- Hire a property manager as a 24-hour presence to discourage vandalism

• **The report should be well illustrated.** Illustrations of the subject property as well as the charrette process and the team products greatly enhance these reports. Historic photographs or charrette renderings that show a vibrant version of the property are important to include. Be sure to convey the enthusiasm exhibited by charrette participants or others to date. Quotes from community leaders or excerpts from news stories or editorials can be very powerful.

• **Charrette organizers should take the opportunity to recognize sponsors, funders, and all participants in this document.** Organizers may want to invite a key leader who has a stake in the outcome to provide a letter, remarks, or quote to open the report. This serves as an expression of the organizer’s appreciation as well as a reinforcement of the stakeholder’s investment in a positive outcome.

It is important to produce the report soon after the event to make use of the momentum generated by the charrette. Plan for the creation and production of the report before the charrette, and complete and distribute it in less than one month following the charrette.

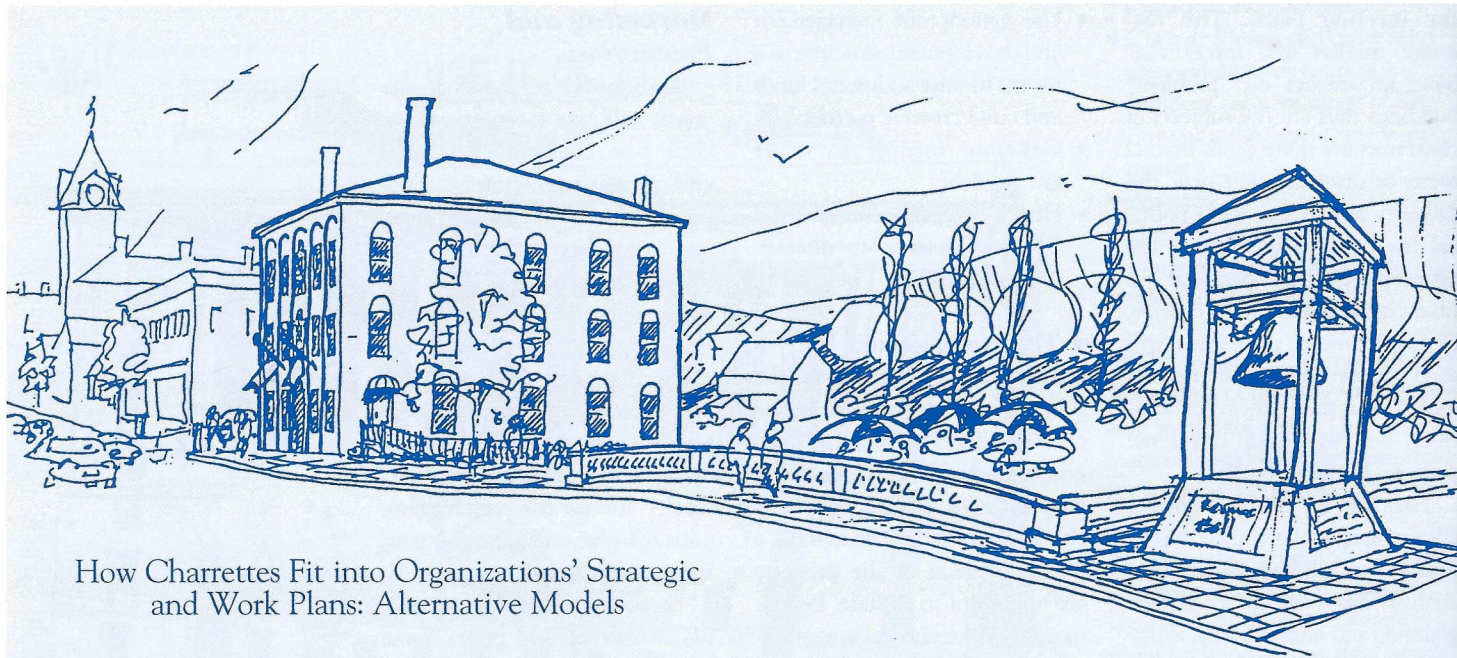
## **Marketing and Promotion**

Distribution of the charrette report will play a central role in your post charrette marketing and promotion strategy. Step back and consider your primary and secondary audiences. Are you trying to attract developers and investors? Are you trying to influence elected officials or energize community stakeholders? Is your list of key targets different than the list that was created for pre-charrette outreach? Revisit the pre-charrette outreach plan and adjust for new, specific approaches.

There is a wide range of possible marketing and promotional activities. Most organizers host a splashy public event or press conference at which time the report and charrette findings are released. The Boston Historic Theater Charrette attracted an overflow crowd of 300 people. Not only were the attendees curious about the findings, but they were also interested in visiting a grand theater foyer that had been closed to the public for a decade.

The report should be distributed beyond the event attendees, to all charrette participants, and to other individuals who have expressed a strong interest in the charrette outcome. This not only acknowledges their interest or contributions, but also encourages these individuals to serve as ambassadors for the building’s redevelopment and the charrette findings.

To focus the attention of developers on the threatened properties, the organizers may meet with prospective developers to discuss priority reuse scenarios, send traditional or internet mailings to potential users or investors, or advertise the property’s sale, lease, or request for proposals as appropriate. Another common step is



## How Charrettes Fit into Organizations' Strategic and Work Plans: Alternative Models

Historic preservation organizations and other groups with similar interests embrace the charrette concept because a preservation development charrette can identify feasible reuse solutions for an endangered property and lead to its reuse or revitalization. A charrette program can also create hope and optimism for a positive preservation outcome, change how key decision-makers think about a threatened property, and build public and political support for investment and change.

The program can also have a very positive, secondary effect on the organization. A charrette leads to new contacts and new membership support and generates publicity for the organization. During the program's development, and certainly when objectives are met, the charrette can boost the credibility of the group and emphasize the benefits of historic preservation.

Some organizations conduct charrettes on an as-needed basis. But the following two groups provide another model.

To meet its strategic goals such as preserving significant historic resources, expanding visibility, and building the local historic preservation movement, the Boston Preservation Alliance plans to conduct a charrette every year or every other year. Ideas for the subject of the charrette come from the staff, board members, and colleagues at the Boston Landmarks Commission, the statewide historic preservation advocacy organization, the mayor's office, the local chapter of the American Institute of Architects, and the regional office of the National Trust for Historic Preservation. Budgets have ranged from \$3,000 to \$50,000.

Plan New Hampshire, a nonprofit organization of planners, architects, builders, bankers, developers, and preservationists, offers charrette services to local communities and nonprofit organizations on a regular basis through a competitive process. The organization made a strategic decision in 1990 to adopt the

charrette concept as a signature program; the board of directors saw it as an effective and tangible way to provide technical assistance to communities throughout the state.

Three charrettes are held each year. Interested communities submit brief proposals outlining their proposed project during an annual application process. Plan New Hampshire evaluates the proposals based on the importance of the project to the community, the scale of the project (can it be addressed in a weekend charrette?), and the community's ability to move forward with the findings.

Choosing a committed client who will perform some of the background work, and who is prepared to utilize the charrette results, dramatically reduces the sponsor's role in pre-charrette outreach and post-charrette marketing and promotion.

On a related note, its \$2,000 charrette budget is very lean. A board member typically serves as the pre-charrette organizer and post-charrette report producer so that no staff or consultant costs are incurred. The client is asked to secure the funds for producing a simple report and event costs.

Recent preservation development charrettes sponsored by Plan New Hampshire have resulted in a restored 1830s textile mill, the introduction of elderly housing in a compact village, improved access to a tightly packed mill yard, and the stabilization of an early 19th-century hotel. Plan New Hampshire Charrette Committee Chair Jeffrey Taylor credits the success of these efforts to the charrette's team approach. According to Taylor, design and development experts must work with community representatives to offer recommendations based on local insights and needs; local leaders must "own" the project when the charrette is complete.

to encourage a more sophisticated pre-development analysis than the charrette may have produced. Organizers can identify funding sources and support a request from the property owner or relevant organization or agency.

The Providence Preservation Society advertised the state-owned Masonic Temple in preservation and real estate journals. A one-page description of the development opportunity was sent to a list of prospective local and national developers. In response to inquiries on the building, the society sent the charrette report, supplemental development data, and a resource list of agencies and individuals who could assist in developing proposals for the Masonic Temple.

To develop wider interest in the property, organizers can promote mass media coverage about it and include stories in the newsletters and websites of the sponsoring organizations. Programs such as tours, oral history projects, or sales of mementos related to the building (like postcards, T-shirts, or reproduction architectural artifacts), also keep public attention focused on the issue.

Another common post-charrette activity has both real and promotional value. Charrette participants often recommend stabilizing the building, to reduce the spiraling costs associated with the building's rapid deterioration while a new use or new owner can be found. Improving the appearance of the building's exterior also gives people a tangible sense that the future for the building is optimistic. Try to secure a commitment of funds to stabilize the building from the owner, an investor or the local government redevelopment agency. A "work day" or painting party may produce the temporary facelift that a building needs.



## Declaring Success

Clearly defining the end point of a charrette program can be a difficult task. Even if the initial goals for the charrette and the threatened building are clear, the fluid process of securing a reuse for the building and the dynamics of working with groups, especially volunteers, may affect the program's completion.

Some organizers may feel that providing the charrette report to the property owner or another obvious client is the end of their formal involvement. Others may believe that raising awareness of the threatened property and identifying reuse solutions is all that they can or should do.

If organizers seek to be more involved in post-charrette efforts, they may reduce or terminate their involvement in the program when other parties step forward to lead the effort. A

government agency, group of individuals, or nonprofit organization such as a community development corporation may assume this role.

Other charrette organizers may choose a point in the development process—such as the owner's commitment to rehabilitation, or the sale of the property to a developer—as the signal to redirect their attention and resources to other initiatives. If the ribbon-cutting ceremony following a major rehabilitation project is perceived as the endpoint, the organizers may have chosen to serve as advocates during the development process and helped with fund raising, zoning, and architectural review.

Before the program is considered complete, make sure that important wrap-up tasks are accomplished. These activities seal the success of your venture and make any later steps or the

*Plan New Hampshire offers charrette services to local communities on a regular basis through a competitive bidding process. In Newport, N.H. design professionals worked with the community to develop possible reuse solutions for the 1825 Eagle Block.*

*—Photos courtesy of New Hampshire Office of State Planning*



next charrette more efficient and productive. Review and complete these types of activities:

- Thank all charrette participants, steering committee members, sponsors, funders, and others as appropriate;
- Finalize and distribute final reports to funders;
- Ascertain that the press clipping file and collections of photographs, slides, and other illustrations are complete and easy to access;
- Evaluate the program with input from the steering committee; and
- Consider what's next!

### Evaluating the Charrette's Effects

No matter how many weeks, months, or years the organizers commit to the charrette program, its benefits are tangible. All of the properties described here, once threatened by deterioration or demolition, still stand and many are revitalized.

In the majority of these cases, the charrette created the type of public support and climate for positive change that encouraged elected officials and public agency leaders to assume strong pro-preservation positions and practices. In Boston, Mayor Thomas M. Menino initiated a major, multi-million dollar infrastructure improvement project adjacent to the theaters after the Boston Historic Theater Charrette. The improvements to the streetscape were designed to demonstrate the city's commitment to the long-deteriorating district and entice developers to the historic theater buildings. Pinebank and the Masonic Temple also received building stabilization monies from public agencies after the charrette to encourage prospective redevelopment.

Different combinations of factors drew interested developers and investors: changing market forces, public and political commitments such as in Boston, and new redevelopment ideas. At the Boston charrette and a charrette that examined the reuse opportunities for a downtown department store in Providence, the eventual developers had both served as charrette participants and received first-hand building assessments, insights into financing opportunities, and an unusual, intense impression of public support for each building's revitalization. One developer was a Texas-based theater management and development specialist invited to the charrette as an out-of-town expert; the other was the leader of the local community college that needed to expand.

Although he did not participate in the charrette, the new owner and developer of Knowlton was well known to the charrette participants. The Victorian estate was redeveloped as a catering and special event facility, which was a priority use recommendation from the charrette.

As stated earlier, the charrette program is also a catalyst for organizational growth if properly designed and executed. The sponsoring organization will enjoy new supporters as a result of the outreach, visibility, and the productive, professional tenor of the charrette.

The program may also spur other investments in historic properties near the once-threatened property. And, perhaps, it will motivate your group or others to conduct another charrette. *Bon chance.*

### Acknowledgements

This publication was written by Jennifer B. Goodman, executive director of the New Hampshire Preservation Alliance. In New Hampshire, and in previous positions in Philadelphia and Boston, Ms. Goodman has designed and implemented a wide range of successful preservation planning and development projects including charrettes.

This work benefited greatly from the insights of other charrette organizers including Albert Rex, executive director of the Boston Preservation Alliance; Wendy Nicholas, director of the Northeast Office of the National Trust for Historic Preservation; and Arnold Robinson, former executive director of the Providence Preservation Society. Contributions by Frederick L. Richards and Jonathan Goodman are also greatly appreciated.

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