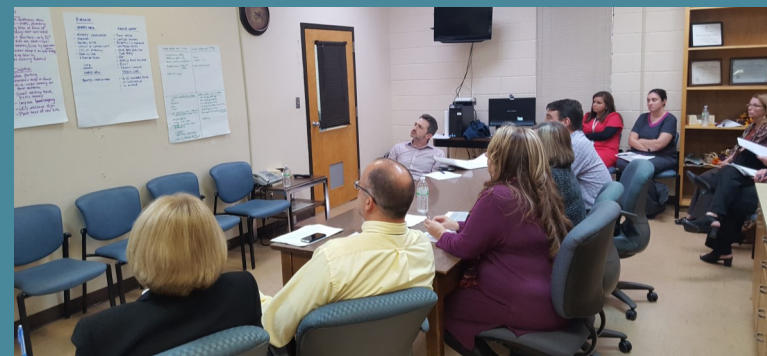
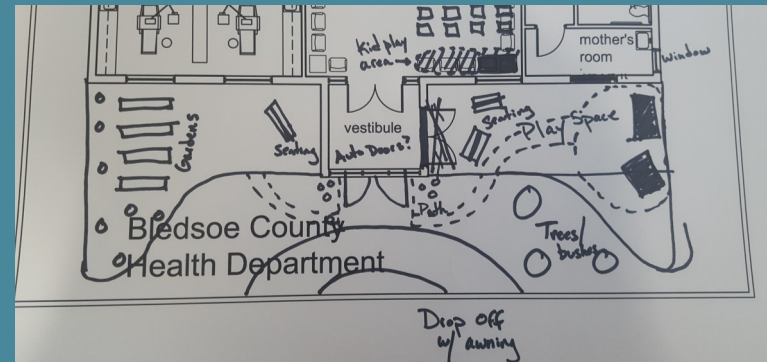


DESIGN CHARRETTE MANUAL

TENNESSEE DEPARTMENT OF HEALTH

Community Health Services

In Partnership with the Office of Primary Prevention







This publication was created for the Tennessee Department of Health Office of Community Health Services, by Mike Thompson, M.Ed., Commissioner's Fellow, Office of Primary Prevention.


It is a resource on hosting design charrettes with local health departments working with their communities on building or redesigning a county health facility.

Tennessee Department of Health
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CHARRETTE OVERVIEW

What Is A Charrette?

A charrette is a collaborative process in which stakeholders, community members, designers, and architects collectively brainstorm design ideas for an upcoming development project. Despite following a general format, there is no one single method for hosting a charrette, so long as the process elicits participant feedback while exploring the many project design potentials. Whichever form is chosen, priority should be given to engaging and soliciting feedback from all participants. Charrettes are intentionally inexpensive and use techniques accessible to the knowledge and skill level of the participants present.

Charrettes can be a short meeting, or last several days, depending on the intensity of the project and desired depth of stakeholder engagement. What makes a charrette different than a vision session however, is the exploration and analysis of *specific* project design features, while soliciting input from participants on those features.

Why Host A Charrette?

Even if not in a formal setting, there are several benefits and reasons for hosting a charrette. Charrettes allow stakeholders to:

- Develop education and build capacity among participants and project leaders;
- Develop and instill the values of community planning and collective engagement on new development projects;
- Create tangible, useable information for the design team and architect(s) that reflect the desires of a community;
- Create space for people to be heard and give input on changes to their environment.

REMEMBER: Charrettes allow for public feedback which may otherwise become pushback to the project. Offering space for people to inform the project during the design phase helps mitigate this tension.

When To Host A Charrette?

While a Charrette can technically be hosted at any point during the project design phase, they are most effective if held at the beginning, prior to first designs. When a project is still in the early research and conceptual stages, feedback can most easily be received and integrated. Additionally, the early stages of a project are generally the least contentious as no specific designs have been conceptualized or presented.

Charrette Considerations

There is no one single form or method for conducting a charrette. Rather, several factors should be considered prior to developing the agenda and target audience.

Scale of the Project and Charrette?

One of the first questions to determine is the scale of the project, and the level of input needed or desired from stakeholders. Larger community projects will require larger feedback, while smaller builds may only necessitate a small group.

Who is the Target Audience?

Your audience will most often be the people most directly effected by the new project. This will be health department staff, and any local residents, business owners, or city officials you wish to invite. When making plans for and advertising the charrette, consider who should be at the table. A participant identification table is located on page 11.

Who should participate, and when?

Its often difficult or not feasible to have your entire desired audience present for each charrette. Instead, consider either hosting several sessions with different audiences, and crafting your messaging and activities in an way that is approachable and understandable to that audience.

REMEMBER: *More is not always better, but something is usually better than nothing. Charrettes are a balance of getting feedback, but not overwhelming or overpromising participants.*

Prior Knowledge?

How much does your audience already know about the project, and do they have technical knowledge on design and development? Depending on the level of audience expertise, you may have to scale up or down the technicality of your activities, the depth in which you solicit feedback, and the amount of facilitation/training needed. For example, local residents may be able to help identify amenities in their neighborhood or what external building amenities they would like, but not necessarily what features should be included within the new health department.

Future Session?

One of the most important features of a charrette are the next steps. Along with compiling feedback, communicating with participants when and if future charrettes will take place is crucial. When deciding on hosting future meetings, consider the scale of the project, its timeline, and affected audience size. Comprehensive projects with large audiences should contain at least a few charrette rounds, each one occurring after a new design is presented.

REMEMBER: *Sometimes it may be viable to host smaller charrettes with local leaders or stakeholders, who can then report out to their constituents, staff, or fellow community members.*

HOSTING A CHARRETTE

Pre-Planning

Identify Desired Outcomes and Stakeholders

A key determinant of planning a charrette is by first outlining what the desired outcome should be. Is the intent simply to pull together stakeholders? Is input desired? If so, what level of information is desired? Answering these questions will begin to inform the format and intensity of the charrette agenda.

Create & Convene a Steering Committee

Like any endeavor, establishing a clear leadership team is crucial to success. This team should be the primary contact for public input, be responsible for convening (and possibly facilitating) the charrette, and for compiling and communicating all feedback to the design to the designers/architects. The team should include the Regional and/or County director for the project, and the regional Healthy Development Coordinator.

Review Active Building Guidelines

For the Tennessee Department of Health's charrettes, the Active Building Guidelines are a suggested component of consideration and emphasis. To ensure that the facilitator(s) can adequately discuss the Guidelines, the steering committee should review the entire Guidelines document. The Guidelines can be viewed and downloaded on the TN Department of Health's Healthy Places Website.

Create Agenda, Determine Role and Responsibilities, and Find a Location

Based on the desired outcomes and scope of the project, the steering committee should set the agenda for the charrette, including the activities used for eliciting feedback. Part of this process should include assigning responsibilities, and determining what roles each will play during the actual charrette.

REMEMBER: *The facilitators are the most important role during the charrette. They are responsible for guiding the entire process, keeping the session on track, and steering discussion.*

When planning the activities and scope of the charrette, it's critical to be mindful of your audience, their availability, and level of knowledge around the project or terms. Be intentional to set clear beginning and ending times into the agenda. Crafting time into the agenda to explain terms and processes may be necessary to ensure all participants are able to engage. A good rule of thumb is to start small, and build upon the preceding activity. A list of example activities are found on page 8.

When choosing a location to host the charrette, consider both location accessibility for your desired participants, as well as the room itself. Ideally, the room should be big enough for participants to break up into small groups, but not so big as to inhibit large group communication and facilitation.

Materials Prep

Not every charrette will use the same materials, but materials are used in every charrette. Materials can be as simple as markers and paper, or more complex like land use and zoning maps. Materials should be creative, and tangible, but not overly complicated or potentially confusing for participants. Resources like maps and blueprints can be great, but may not be easy to obtain or understand for some participants. Likewise, some materials may require extra time and depth to explain. Balancing useful and confusing materials is something to be aware of when choosing materials.

REMEMBER: *City and county officials, mayors, and even planning departments can be a great resource for maps and data. Likewise, the office of Community Health Services or the regional health department may have relevant blueprints and data.*

Invite Participants

Once an agenda and location are established, begin reaching out to your desired participants. These should be the stakeholders identified during outcomes identification. Be cognizant of inviting a diverse set of people to provide feedback, and balancing that with available space and time.

Facilitation

Room Set Up and Materials

The room should ideally allow for all participants to sit around tables or in small groups. This will reduce the time needed to move around during and between activities and report out. If additional room(s) are needed, make sure that participants know where the rooms are located and how to get to each room. Ensure too that a section of the room remains clear in order for the facilitator and groups to present and report out on their activities.

As able, all materials should be placed on the table(s) prior to the charrette starting. This will reduce the time needed to pass around materials during the activities.

Facilitation

The facilitation is the most important role of the charrette process. The facilitator keeps the charrette on schedule, ensures discussion remains constructive, and most importantly explains each step of the charrette to participants. The facilitator needs to be able to balance keeping the session on track, while ensuring all participants have chances to contribute. Having a strong facilitator is key to a successful charrette. The facilitator is also often tasked with compiling and communicating all feedback and notes after the charrette is complete.

Co-Facilitator

For groups larger than 6 people, it's important to have at least 1-2 co-facilitators assisting with the charrette. Co-facilitators should help distribute and manage materials, take discussion notes while participants report on activities, and help steer conversations during breakout activities. When recording and note taking, co-facilitators should keep to what was said as closely as possible, and avoid including their personal interpretation or reactions into their notes.

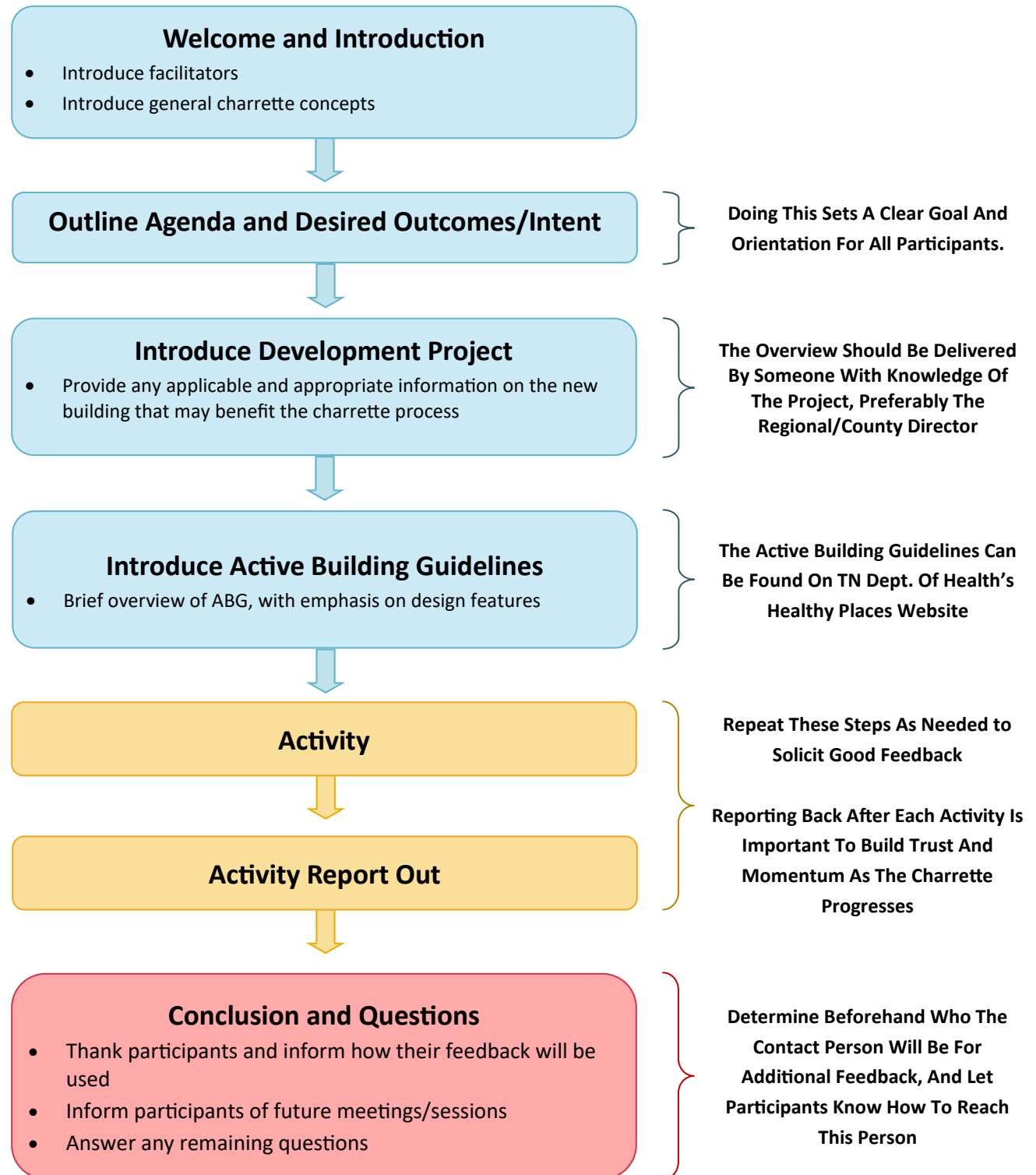
Important Facilitation Reminders

- Charrettes are a balance of creating a level playing field, fostering activities that are accessible to all participants, gathering important feedback, and keeping the session on schedule. Learning how to effectively balance all these takes time and practice.
- Be mindful of technical language and terms used when working through the project. While health department staff are very knowledgeable about their work, there may be less understanding about architectural and design concepts.
- When doing participants introductions, ask that they provide 1-2 words that represents that specific health department. This gets participants thinking abstractly about where they work, while setting the foundation for future activities.
- Allow space and opportunities for everyone to share their inputs. Each person may have a different level of comfort, so tailoring the charrette and activities along the way may be necessary to engage as many people as possible.
- Charrettes are intentionally a time for sharing *any* and *all* ideas. Don't let the facilitator or other participants block people from sharing their input.
- Be mindful of project architects, local officials, or others with knowledge and experience of the project. You'll want to ensure they can provide valuable input but not dominate the conversation. Be aware too of other participants looking to these people for "approval" of ideas, or the risk of potentially developing tensions within the group, especially with elected officials.
- Keep activity groups the same throughout the entirety of each session. Group members tend to "bond" the more interaction they have, thus building momentum on feedback and interaction.
- Take pictures of the group, presenters, and especially activities. This not only helps with recording who was present, but can be used on reports or leveraged for funding requests.



Steps and Methods

This chart outlines a fairly typical charrette process. While each charrette will look a little different, this is a good starting point when developing an agenda and choosing activities.



Example Charrette Agenda

1. Welcome

2. Agenda

1. Overview of Charrette (5 min)
2. Project Introduction (5 min)
3. Introductions (15 min)
4. Activity 1 (30 min)
5. Activity 2 (30 min)
6. Conclusion & Questions (5 min)

Total Time: Approx. 90min

3. Goal of Today

We're going to spend some time thinking about the place we work, and begin brainstorming a new workplace together.

4. Overview of a Charrette [5min]

- Charrette Definition
- Value of a Charrette
- Components
- Outcomes from a Charrette Process

5. Project Introduction [5 min]

- Timeline
- Location
- Project leadership & design team (as appropriate)
- Existing conflicts or barriers (as appropriate)

6. Introductions [15 min]

- Go around the room, introduce selves

7. Introduce Active Building Guidelines

- Supply copies of Guideline design features section

8. Activity I (30 min)

- Work in tables/small groups to complete quadrants poster:

What works well within the building	What works well around/outside the building
What doesn't work well within the building	What doesn't work well around/outside the building

8a. Report Out I

- One person report for each group

9. Activity II– Draw/Create [30 min]

- Using copies of the Active Building Guidelines, draw/trace out what you would like to see
 - Note which ABG elements you used
 - No requirement for a certain number of elements, or where they are located
- You don't need to be an architect or engineer!
- Think about how you use your office, and in what ways it would be more conducive to your and your patients' experience? How might it support physical activity? Healthy eating? Mental health?

9a. Report Out II

- One person report for each group

10. Conclusion & Questions [5 min]

- Thank you
- Next steps

Charrette Activities

Role of Activities In A Charrette

Activities are the crux of the charrette process, and are the key times in which participants engage with and provide feedback. While there are nearly countless types of engagement activities to choose from, the final activities for a health department charrette should be mindful of time, room space, and knowledge of the participants. Balancing these considerations with desired feedback will be a consideration for the team creating the agenda. While doing a site visit or walk-around with the entire staff may elicit strong feedback, it may not be possible to close the health department down to allow staff time to do that.

Special emphasis should be given to tangible, interactive activities that engage participants in multiple ways. Drawing and creating is often an easy and powerful activity that leads to strong discussion, reflection, and feedback. This may include using markers and paper, or even playdough or other malleable materials.

Some Example Activities:

Mapping—Using markers or other physical materials, have participants spend time drawing out what they would like to see in the new health department building. Encourage participants to focus less on specific dimensions, and more on components and their location throughout the building. It may be helpful to spend time drawing the inside of the building, and then switching to the outside the building.

REMEMBER: *Hands on activities are important, as they engage people of all ages and abilities, while spurring creativity and dialogue.*

Quadrant Poster— Divide a large sheet of paper into four sections, and ask participants to describe what they *like inside the building*, *outside the building*, and what to *improve inside the building*, and *outside the building*. Great early activity.

Notes/Stickers—Can be used to write out how participants feel about the building, and/or their impressions of the area. Place on a central area and report out to the group. Good first activity or during introductions. Sticky notes can also be used as a voting tool on different design features further along in the project. Placing different image examples on the wall, participants can move around the room placing notes on images they like/don't like.

Walk Audit/Site Visit—Either at the existing or future site, facilitators guide participants in small groups around the site and discuss what they see, and what they would like to see. Make sure someone takes notes, or provide worksheets to participants to self complete. Great activity for more in-depth feedback, prior to a mapping exercise, and if a future site has already been chosen.

Simulation—Have staff act out visiting the department as a patient, and working different positions as staff members. Ensure that staff are noting how current designs help or inhibit their experiences. While simulations take more time and planning, they allow participants to experience the department in a new way and with fresh perspectives.

CHARRETTE FOLLOW-UP

Follow Up and Next Steps

Future Feedback

As the charrette nears completion, make sure to communicate to participants who they can contact if they have further feedback. This should most likely be either the county or regional director, and ensures participants don't feel as if the feedback is no longer welcome. It also allows those who weren't able to attend to still have a chance to contribute. Likewise, be sure to let participants know if and when future charrette sessions will be held.

Evaluation

At the very end of the charrette, ask participants if they felt the session was helpful, or if they have recommendations for future charrettes. Depending on the charrette intensity and plans for future sessions, you may want to formalize the evaluation by providing feedback forms. Ideally this would be a simple paper questionnaire participants could fill out as they leave. Whether done formally or informally, evaluating your charrette is important to continually adapt and improve the effectiveness of your process.

Gathering and Compiling Feedback

As the charrette ends, immediately gather all notes, drawings, and other materials used for feedback. Make sure to label each of these materials so as to know which group provided the feedback. The design team should review these notes and compile to pass along to the design team. Depending on the size of the group, this could be delegated to one or two people.

When compiling notes, its important to include everything, even if its unlikely to be included in the final design. This provides the fullest picture to the design team while ensuring all voices are heard. Additionally, make special note of any and all feedback that incorporates features from the Active Building Guidelines. However the team decides to note these it should be easily recognizable which suggestions relate to the Guidelines.

REMEMBER: Take photos of or scan all feedback materials, writings, and drawings. This ensures accurate records of what was provided.


REMEMBER: When compiling feedback, the more gathered and concise the better. The design team should be able to easily identify participant feedback.

Feedback Report

This report layout below comprises feedback from a charrette in Bledsoe County. Each box represents feedback from a different activity. Additionally, it denotes if feedback was repeated by multiple participants and/or is an element of the Active Building Guidelines.

There is not one single way to compile and report on charrette feedback, so long as the information is clear and concise. While the example layout is just one way, creating a format that is simple, and easy to read is most important. It may be helpful to create a single template that can be reused or adapted for each concurrent charrette.

BLEDSOE COUNTY HEALTH DEPARTMENT Staff Design Charrette Feedback



What Words Describe The Bledsoe Co. Health Department?

Community Hub	"Help" Dept.
Service	Adequate Space
Helping People	Kids
Meeting Needs	Friendly
Plumbing	Broad Services

STAFF CHARRETTE SESSION

BLEDSOE CO. HEALTH DEPARTMENT
PIKEVILLE, TENNESSEE
NOV 8 2017

WORKS WELL:

Inside the Building

- Dental office
- Good sized offices, pharmacy, and kitchen
- Lab close to front door
- Individual offices & patient privacy
- Single floor/level
- Natural light in offices **ABG**
- Lab door
- Brick columns /aesthetics
- Reception area in center of building
- Wide hallways **ABG**
- Safety with basement

Outside the Building

- Easily accessible by car
- Beautiful views

Bolded features indicate repeated mention/comments
ABG indicates feature related to the Active Building Guidelines


NEEDS IMPROVEMENT:

Inside the Building

- Separate conference room from kitchen
- Utilities
 - * HVAC/Temp **ABG**
 - * Electric & lighting **ABG**
 - * Plumbing **ABG**
- Parts of waiting area outside sight line of receptionists
- Room signage **ABG**
- Building security
- Short Counters (only 32")
- Lack of storage
- Waiting Area
 - * Child activities
 - * Info kiosk
 - * Work station/sink near urine door
 - * Better lighting & natural light **ABG**
 - * Chipped paint **ABG**
 - * Loose tiles
 - * Move dentist suite further away from lobby
 - * Automatic doors & staff entrance to parking

Outside the Building

- Parking lot
 - * Designated parking (staff)
 - * Consider moving to back/side of building if creating path to entrance
 - * Improved lighting **ABG**
- Awning and drop off at front entrance
- Walking track **ABG**
- Sidewalk/Pedestrian Infrastructure **ABG**
- Seating outside **ABG**
- Landscaping
 - * Trees & low maintenance plants **ABG**
 - * Around front entrance **ABG**
- Health Department Sign
- External lighting **ABG**



CHARRETTE FOLLOW-UP 10

Additional Resources

Participant Identification Chart

The below chart may be helpful in identifying who should be invited to participate in the design charrette, particularly when considering members of the community. While all Health Department staff should be invited, strategic targeting of external stakeholders can lead to better feedback, while simultaneously deepening the connection between the public and the local health department.

Organization/Assoc.	Perspective	Person/ Representative	Connection to Project	Outreach Strategy	Invite to Charrette?	Individual Meeting Needed?

Helpful Links

Healthy Places Website <https://www.tn.gov/health/cedep/environmental/healthy-places.html>

Active Building Guidelines https://www.tn.gov/content/dam/tn/health/documents/healthyworkplace/ABG_Final.pdf

National Charrette Institute <http://www.charretteinstitute.org/>

Design Charrettes <https://www.nngroup.com/articles/design-charrettes/>

Elements that Contribute to Healthy Building Design <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC1892106/pdf/ehp0115-000965.pdf>

APPENDIX

Images:

Cover: (from top) Health Department Desk (tn.gov/health), Charrette Sketches (Mike Thompson, 2017), Jackson County Health Department (tn.gov/health), Bledsoe County Charrette (Mike Thompson, 2017)

Page 1: Montgomery County Tennessee, (mcgtn.org/health)

Page 7: Dodson Family Health Center, Sumner County, (*Mike Thompson, 2016*)

Page 12: Bledsoe County Health Department Charrette Report, (*Mike Thompson, 2017*)

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