

# **DESIGN CHARRETTE: IMPLEMENTATION GUIDE**

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Prepared by:

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**American Planning Association**

## PROJECT BACKGROUND:

In 2016, the Agency for Toxic Substances and Disease Registry (ATSDR) released the [\*Choose Safe Places \(CSP\) for Early Care and Education Guidance Manual\*](#) and began funding 25 cooperative agreements with states to begin building the CSP programs. Following the devastation of the 2017 hurricane season, ATSDR began the mission of creating the *CSP Disaster Recovery Supplement* to aid in the disaster recovery efforts for Early Care and Education (ECE) programs and facilities.

In December 2018, the American Planning Association began a new project in collaboration with the National Environmental Health Association (NEHA) and Region II Head Start Association. Through disaster recovery funding from ATSDR, these groups began working together on the CSP initiative to help inform and educate decision-makers and professionals about the proper siting of the ECE programs.

About the Guide: As part of this effort, APA developed *A Guide to Public Participation in Hurricane Affected Areas*. This guide provides an overview of strategies and methods for public participation to incorporate community perspectives during planning and redevelopment processes. The goal is to build the capacity of planners to conduct a public participation process, especially in hurricane-affected areas. The Design Charrette Supplementary Guide is included in the Public Participation Guide as an appendix and provides a path to organizing a design charrette. **This implementation guide provides instructions and guidance for conducting a design charrette in communities.**

The primary audience for the design charrette is planners, but it can also be used by other stakeholders, such as community leaders and other professionals (e.g., professionals with design background), who are involved in public participation processes.

## PURPOSE OF IMPLEMENTATION GUIDE:

The purpose of this implementation guide is to outline the steps involved in piloting the Design Charrette Supplementary Guide for new development or redevelopment projects.

This guide provides direction to the state Department of Health (DOH) to disseminate the guide to planners, design professionals, community leaders, and community-based organizations to pilot this tool and collect their feedback. We want to thank you in advance for your hard work and for investing your time to pilot this guide in your region. The design charrette users will be able to provide feedback, which will help us improve this product and improve implementation efforts in the future.

In the sections below, we provide a way to pilot this tool. The task is to find communities that are charrette ready and are thinking of using design charrette as a public participation method for engaging community members. We recognize that each community is different, so please change this process to best suit your region and purpose. The Public Participation

Guide provides some recommendations to make your public participation process a good fit for your community.

## IMPLEMENTATION STEPS:

This section explains the steps to be taken to implement the design charrette guide. It is highly recommended that you read the Public Participation Guide and the Design Charrette Supplementary Guide completely before implementing the following identified steps:

### Step 1: Identify the state-level networks to contact:

Collect relevant contact information from the following state-level organizations/agencies/associations. The links will take you to the list of the states or regions that have associations. Click the state/region of interest, and you will be directed to that specific association. Once there, use the “Contact” tab on that page to collect the email address and phone number.

- State Planning Departments (if your state has a planning department)
- [APA State Chapter](#)
- [National Community Development Association](#)
- [National Alliance of Community Economic Development Associations](#)
- [Local Initiatives Support Corporation \(LISC\) local offices](#)
- State Chapters of other related organizations:
  - [American Institute of Architects](#) (AIA has over 200 chapters in US and abroad, some are at state-level and some are at the municipality-level)
  - [American Public Health Association](#) (APHA has state and regional public health associations)
  - [American Society of Landscape Architects](#)
  - [National Recreation and Park Association](#)
  - [Urban Land Institute](#) (Some ULI councils are at state level and some are at the municipality-level)
- Major [accredited planning programs](#) in the universities. Please contact the department head/director of all the universities in your state. If they do not know about a community or a neighborhood, there is a possibility that they could use this tool in their class work including plan-making or design studio projects.
- [State Associations of Counties](#) (Please click the accordion “State Associations” to get the list)
- [State and Local Government Management Association](#)

In addition to these organizations/associations, identify contacts whom you know and believe may be able to help. These individuals could be working with state or local agencies or with local non-profit organizations.

## Step 2: Contact these State Organizations:

Once the contact list has been created, you may wish to contact them first via email. If unsuccessful via email, reach out via phone. The purpose is to ask for their help in outreach efforts. They can reach their members to identify the communities interested in piloting the tool. Ideally, these organizations can use the communications tools at their disposal such as newsletters, webinars, and conferences to reach the audience. Below is an email template you can use to contact these organizations/associations.

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### Email Template

Dear XXX,

My name is XXX, and I work for XXX. My organization is seeking feedback on a tool that may help your members with the public participation process. This tool, *A Guide to Public Participation in Hurricane Affected Areas* (insert link here) provides guidance to planners, community leaders, design professionals, and elected officials interested in conducting a public participation process. It includes general recommendations for public participation and detailed guidance on how to organize a design charrette (see Appendix A – *Design Charrette Supplementary Guide* in the guide).

We are looking to pilot the Design Charrette Supplementary Guide in communities interested in using design charrettes for development or redevelopment projects. The users will be able to provide feedback on the tool, and we will use that feedback to improve the tool. We are seeking feedback specifically for the design charrette component of the guide; the public participation component is for reference only (if needed).

Your members play a crucial role in development projects, and it would be extremely helpful if you are willing to disseminate this information through your communications channels such as newsletter, listservs, social media, and webinars. Would you be willing to disseminate this tool to your network? If you are willing, we can share a short blurb with you to pass along to your members.

If you have any questions or would like to discuss this effort in more detail, please contact me via email (insert email) or phone (insert phone number).

Sincerely,

XXX

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### Short Blurb

Use the following blurb for social media and other places where short description is needed:

Are you interested in using design charrette to engage residents in your projects? Please use this step-by-step toolkit (insert link) and provide feedback (insert link) on how to improve it. If you

are interested and want more information, or if you have decided to use this tool, please contact (insert email).

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## **Long Description**

There may be opportunities to include long descriptions in communications materials such as a newsletter. In such cases, use the following description:

The American Planning Association (APA) in collaboration with National Environmental Health Association (NEHA) and Region II Head Start has created a tool, A Guide to Public Participation in Hurricane Affected Areas (insert link here). It provides guidance to planners, community leaders, design professionals, and elected officials interested in conducting a public participation process. It includes general recommendations for public participation and detailed guidance on how to organize a design charrette (see Appendix A in the guide).

We are looking to pilot the Design Charette Supplementary Guide in communities interested in using design charrettes for development or redevelopment projects. The users will be able to provide feedback on the tool, and APA will use that feedback to improve the tool. We are seeking feedback specifically for the design charrette component of the guide; the public participation component is for reference only (if needed). If you are interested and want more information, or if you have decided to use this tool, please contact (insert email).

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## **Phone Script**

Perhaps in your jurisdiction, the easiest way to connect is by phone. If this is the case, please consider using the following script:

Hi,

My name is XX and I work for XX. We have developed a tool that may be helpful to your members with the public participation process. I would like to discuss with you or someone else in your organization a possibility to disseminate this tool to your members for feedback. Who would be the most appropriate person to contact regarding this tool?

[If the person on the phone believes that you should contact someone else in the organization (can be president, communications person, administrative staff), ask the person on the phone for that person's contact information and/or offer to leave your contact information. Then follow-up with the new person later.]

[If you reach the right person— use the above email to describe the guide and purpose. Once described, ask if he/she is interested in helping with the dissemination. If the person is interested, then thank that person and provide them with the links to the tool and the evaluation tool via email. Also, ask them that if they could notify or copy you on emails once they have

disseminated the information. If the person is not interested, thank them for their consideration, mark it in your notes and move on to the next organization].

[Irrespective of the person being interested or not interested in disseminating this information, ask if he/she can give information or contact information of other organizations or people that may be worth contacting to disseminate this information.]

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### Step 3: Contact the interested person or organization:

Once the organizations have been contacted, members of these organizations may contact you with ideas, suggestions, or questions. The templates below address the two most common scenarios you will face.<sup>1</sup>

**SCENARIO 1:** You may be contacted by someone interested in piloting the design charrette. They may contact you to inform you of their decision, to know more about the tool, or to ask other related questions. In this scenario, please use the following email template for response:

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#### Email

Dear XXX,

Thank you for contacting us.

[If they have decided to pilot the tool, thank them and ask about the project and a possible time frame for implementation. If they want to know more about the product or evaluation, provide a project overview, and ask about a possible time frame of implementation. If they have other questions, please answer them to the best of your knowledge.]

[For Project Overview: Use information from the project background and the “Introduction” on page 4 of the Public Participation Guide.]

As you know, we are looking to pilot this tool and collect feedback from the users. Your feedback would help us improve the tool. The evaluation tool is available at this link (insert link). Please use this evaluation tool after you have conducted the charrette.

If you have any questions about the evaluation or providing feedback, please let us know via email or phone (insert phone number).

Sincerely,

XXX

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<sup>1</sup> There is a possibility that someone or some organization may decide to use the tool without any notification, so please check the evaluation data often.

**SCENARIO 2:** You may be contacted by someone with a suggestion of a person (or an organization) interested in piloting the tool. In this case, send a thank you email to the recommender. Then, use the following email template to contact the person (or the organization).

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### **Email**

Dear XXX,

My name is XXX, and I work for XXX. My organization is seeking feedback on a tool that may help your members with the public participation process. I received your contact information from XXX. They suggested that you may be interested in piloting this tool. This tool, *A Guide to Public Participation in Hurricane Affected Areas* (insert link here) provides guidance to planners, community leaders, design professionals, and elected officials interested in conducting a public participation process. It provides general recommendations for public participation and detailed guidance on how to organize a design charrette (see Appendix A in the guide).

We are looking to pilot this tool in communities interested in using design charrettes for development or redevelopment projects. After using the tool, you will be able to provide feedback on the design charrette component of the guide, and we will use that feedback to improve the tool. Would you be willing to disseminate this tool to your network? If you have any questions or would like to discuss this effort in more detail, please contact me via email (insert email) or phone (insert phone number).

Sincerely,

XXX

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### **Step 4: Conduct Charrette:**

The interested individuals, organizations, or communities pilot this tool. Use the Design Charrette Supplementary Guide in conjunction with the Public Participation Guide to conduct a design charrette.

### **Step 5: Collect Feedback:**

In order to obtain information on the usefulness and usability of the tool, we are asking participants to provide feedback on the charrette process and the public participation toolkit. Please use this questionnaire (insert link) to collect the feedback on the last day of the charrette. Consider that some individuals or organization may decide to use the tool without notice, so it would be beneficial to check the evaluation status often.

## ADDITIONAL INFORMATION:

The email template and the phone script may have to be modified based on the organization or the person you are contacting, especially in cases where you are responding to an email. If you do not get a response to an email, follow up after seven business days via email. If you still do not get a response, wait one week before calling them.

The Public Participation Guide is available in English and Spanish at this link (insert link). Use this link (insert link) to evaluate the guide. If the evaluation is done on the last day of the workshop, we ask that you transfer the information from the paper-based form into the online form, so that the data can be easily obtained. We will not be able to process any findings that are not transmitted via electronic format.

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## APPENDIX A: IMPLEMENTATION IN PUERTO RICO:

Use the following information to pilot this tool in Puerto Rico. For best outcomes, the work should be done in association with American Planning Association and Planners for Puerto Rico group. Before contacting the following people or organizations, it would be helpful to have a call among APA, NEHA, Region II Head Start, and key members of Planners for Puerto Rico to prioritize the list.

### Step 1: Identify the state-level networks to contact:

There are no action items for Step 1. APA has identified the following organizations and people to be contacted for piloting the design charrette. These organizations can use their local knowledge and communications tools such as newsletters, webinars, and conferences to dissemination.

- Puerto Rico Planning Society -
  - Federico Del Monte Garrido: [fdelmontegar@gmail.com](mailto:fdelmontegar@gmail.com)
  - David Carrasquillo: [djcarrasquillo@gmail.com](mailto:djcarrasquillo@gmail.com)
- University of Puerto Rico, Graduate School of Planning
  - Norma Pena Rivera (Graduate School of Planning) [norma.pena1@upr.edu](mailto:norma.pena1@upr.edu)
- Center for Puerto Rican Studies
  - Edwin Melendez [emele@hunter.cuny.edu](mailto:emele@hunter.cuny.edu)
- Hispanic Federation
  - David Carrasquillo [djcarrasquillo@gmail.com](mailto:djcarrasquillo@gmail.com)
  - Laura Esquivel [lesquivel@hispanicfederation.org](mailto:lesquivel@hispanicfederation.org)
  - Charlotte Gossett Navarro [cgossett@hispanicfederation.org](mailto:cgossett@hispanicfederation.org)
- Enterprise
  - "Ruiz, Erika" [eruiz@enterprisecommunity.org](mailto:eruiz@enterprisecommunity.org)



- Red de Fundaciones
  - Rebeca Vicens [rebeca.vicens@redfundacionespr.org](mailto:rebeca.vicens@redfundacionespr.org)
- Foundation for Puerto Rico
  - Monterrubio Luis [arqmonterrubio@gmail.com](mailto:arqmonterrubio@gmail.com)
- Center for New Economy
  - "Raul Santiago-Bartolomei [raulsant@usc.edu](mailto:raulsant@usc.edu)
- NeighborWorks –
  - "Elizabeth Colon Rivera [elicolonrivera.poncenhs@gmail.com](mailto:elicolonrivera.poncenhs@gmail.com)
- Ayuda legal
  - Ariadna Godreau [ariadnagodreau@gmail.com](mailto:ariadnagodreau@gmail.com)
- State Chapters of other related organizations (some of them may not have. Collect relevant contact information from the following state-level organizations/agencies/associations. The links will take you to the list of the states or regions that have associations. Click the state/region of interest, and you will be directed to that specific association. Once there, use the "Contact" tab on that page to collect the email address and phone number.
  - [American Institute of Architects](#) (AIA has over 200 chapters in US and abroad, some are at state-level and some are at the municipality-level)
  - [American Public Health Association](#) (APKA has state and regional public health associations)
  - [American Society of Landscape Architects](#)
  - [National Recreation and Park Association](#)
  - [Urban Land Institute](#) (Some ULI councils are at state level and some are at the municipality-level)

### Step 2: Contact these organizations:

Follow steps identified in the above implementation guide.

### Step 3: Contact the interested person or organization:

Follow steps identified in the above implementation guide. In addition, also contact these community leaders to gauge interest in piloting the tool in their community.

- Comité Pro Rescate de Vieques
  - Roberto Rabin [robert.rabin@cprdv.org](mailto:robert.rabin@cprdv.org)
- Casa Taft
  - Marina Moscoso [marmosara@gmail.com](mailto:marmosara@gmail.com)
- Municipality of Loiza
  - Yeidi [yescobar@municipiodeloiza.net](mailto:yescobar@municipiodeloiza.net)
- Municipality of Comerio
  - Diana Torres Comerio [torres.dianna@gmail.com](mailto:torres.dianna@gmail.com)

**Step 4: Conduct Charrette:**

Follow steps identified in the above implementation guide.

**Step 5: Collect Feedback:**

Follow steps identified in the above implementation guide.