



Ontario Association of Architects

## **Organizing a Design Charrette**

### **A Resource to Successfully Coordinate a Design Charrette in your Community**

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This resource is available on the OAA  
Web site at [www.oaa.on.ca](http://www.oaa.on.ca)



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## **SECTION 1 – INTRODUCTION**

Does the built environment in your city or town need improving? With a little development, could your community be more profitable, functional, and sustainable? A design charrette may be just what your community needs to help develop creative new ideas to bring new life and purpose to your communities existing built environment as well as ways of implementing them.

The design charrette, a method of urban management, works as a community tool or as the first step in providing the foundation by generating ideas and suggestions to a specific community issue or issues. Suggestions resulting from the charrette are just the first in many steps in developing the ideas into a reality for the community.

This resource is designed to help you and your team before, during and after a charrette. The intention is to follow it as a general guideline. By no means should this guide be used as an instruction manual. Depending on the complexity of the issue and size of the community, each design charrette will vary from community to community, but with the examples, suggestions and tips provided, the same basic principles can apply to events of any length.

Useful examples and “how to’s” have been included in the guide to help you along the way including proposed expense items, suggested itineraries, media releases, equipment and supplies checklist and suggestions on how to solicit funds for the charrette. Use the examples as a guideline, but structure it to fit your own process to relate to your specific situation.

Skim over the pages of the guide to get a sense of the commitment and details you and your team may need to be aware of. Your charrette may need to include all of the planning details listed in the guide or you may only find some of them apply to your situation. After you clearly define what community issue your charrette will be improving on, you will be able to decide how much of the guide applies to your event.

This resource is for anyone who is interested in improving their surroundings and has the experience in leading a team. The end result of will be creative ideas to the issue or issues within their community. This could include anyone from the community in any capacity: municipal governments, universities, local community groups, architects, service clubs, local businesses etc.

## **SECTION 2 - OVERVIEW**

Take a look at your community. What are the issues that require attention and need creative solutions? Understanding your community's issues allows you to effectively recognize its needs and be able to respond with appropriate solutions for improvement. By organizing a design charrette in your community, you may be able to come up with fresh and original ideas for these issues.



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key participant in understanding the issues is the community itself. Community participation in the creation and management of their built environment is crucial to the success of selecting the need of highest priority, the design charrette itself and whether or not the resulting ideas are implemented. You may want to consider holding a community meeting to learn what members feel are the major issues that the community must deal with to help the city or town function as efficiently as possible.

### **What is this document?**

The “Organizing a Design Charrette” document is a free internet-based resource created by the Ontario Association of Architects to assist you and your team in addressing community design issues in your town or city. Coordinating a design charrette, the focus of this document, is one way to address these issues, which can include rejuvenation strategies, solutions to traffic issues, design ideas, environmental issues, homelessness issues, or even development plans.

The basis of the guide is to provide general guidelines, suggestions and tips for the community to carry out the management of a local design charrette. An important part of this guide is to develop your own process.

### **Benefits of a design charrette**

There are several ways in which a community can benefit from coming together over a design event. They will be successful at:

- Identifying issues and needs of the community from simple to complex
- The making of a joint vision contributed by all members of the community
- Creating a strategy to achieve both short and long term goals
- Encouraging an alliance of local groups, organizations, businesses etc. that can contribute to community development
- Creating public awareness of community needs and issues needing prompt attention
- Promotion of urban design
- Achieving community pride for everyone involved as a result of contributing to the built environment in which they live

### **What is a design charrette?**

A design charrette is an intense, short-term design project preceded by long term careful organization and followed with practical action and evaluation. The purpose of the charrette is to generate ideas and suggestions to solve and issue or need within the community. The results of the charrette will then be used as a resource itself when the community proceeds to implement the resulting ideas.

Each design charrette will be specific to the community and the issue. This resource provides enough tips and suggestions to carry you through a five-day intensive event, a two-day event or even a short afternoon charrette. Regardless of the length, the basic



principals of the guide apply to events of any length. Logistics are flexible to meet the needs of the issue, community, time constraints, volunteer availability and funding.

**Why does it work?**

The design charrette works because it involves the community as a whole helping to identify a variety of community needs and prioritize them. Design charrettes also encourages partnerships between several disciplines, groups and organizations coming together in a hands-on manner working with design techniques of drawing, even model-making, for a real visual approach to the issue. The process also addresses both the physical and natural environment already existing within the issue and takes into consideration the concerns of the citizens.

**Is a design charrette the right solution for you?**

Before jumping into the planning stages of the charrette, take a moment to decide if a design charrette is the right method for problem solving in your community. Remember charrettes do not take the place of the services of your local professionals or officials, nor is it a way to impose ideas onto the community but rather as a method for consultation. It should be something the community is eager to participate in and seen as a benefit to all.

**What is the process?**

Prior to the actual design event, your team will have several weeks or months of preparation, the length will depending on the nature of your event. The following is a sample of a process broken down into Getting Started, Preparing for the Event, The Event and Follow up. The following table is an example that can help you determine who on your team should be doing what and when they should be doing it.

	<b>Getting Started</b> <i>Months 1-2</i>	<b>Preparing for the Event</b> <i>Months 2- 4</i>	<b>The Event</b> <i>Length to be determined by the issue</i>	<b>Follow up</b>
<b>Community</b>	-Meet with community to discuss issue (s) -Determine action -Create an organizing team	-Build enthusiasm	-Participate in any public sessions	-Analyse reports and proposals -Ongoing participation
<b>Organizers</b>	-Create organizing team -Decide on course for action -Prepare a proposal for the issue -Make contact with potential sponsors -Secure funding from sponsors -Create community enthusiasm through media	-Select team chairperson, volunteer design team members -Secure venue (s) for the event -Secure equipment rental and supplies -Collect and send information kit to volunteer design team - Create community enthusiasm through media	-Event management - Create community enthusiasm through media	-Analyse proposals -Determine course of action - Maintain momentum
<b>Design Team</b>		-Review information kit	-Commitment throughout event -Topic workshops -Brainstorming sessions -Reports and proposal preparation	



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## **SECTION 3 – GETTING STARTED**

Before diving in and recruiting your design team and soliciting funds, make sure you understand exactly what is involved with this type of project. Be sure that you will be able to acquire local support, funding, develop clear goals and objectives and the community has the desire and the ability to follow up afterwards.

### **Issue and Mission Statement**

Why are you organizing a design charrette? What is the community issue? What do you hope to accomplish? What are your goals and objectives? By creating a mission statement, you can organize all of these factors. The mission statement will also help you to remain on course for the duration of the event and can be a gauge by which to measure your achievements by. For a sample of a mission statement see **SECTION 9.1 APPENDICES**

### **Who is involved?**

An organizing committee should be created right away to help share the workload of the preparations. Members could come from the community who are most likely to make the commitment to bring the project about, and to see the project through. Look for the committee's membership to come from organizations such as (but not limited to) the chamber of commerce, service clubs, local society of architects, local community historians, and representatives from the business community. Once you have a strong and committed group in place, elect a chairperson to ensure responsibilities are delegated and all details are being looked after. The chairperson should begin to lead the development of a task schedule with deadlines and begin dividing them among the committee. For a listing of roles and responsibilities that you may want to consider for the organizing committee refer to **SECTION 9.2 – APPENDICES** in this guide.

Involving the community as much as possible to keep the focus of the event community oriented. Encourage involvement from groups such as universities, schools, colleges, cultural groups, churches, social services, environmental and civic groups and youth and seniors groups.

### **Budget of Expenses**

Charrettes can be designed for a range of budgets, depending on the issue and the community. However, insufficient funds or an unrealistic budget can lead to failure. Before soliciting funds, you and your team need to develop a practical budget. Make a list of expenses that will come up and decide where you could request “gifts-in-kind”, services donated rather than funds. See **SECTION 9.3 – APPENDICES** in this guide for a sample list of expenses to consider.



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## Gifts-in-Kind

Some sponsors you will think of approaching would be more suited to donating their services to the event rather than funds. This is just as good as acquiring cash. Such services could include:

- Hotels
- Printers (if needed)
- Consultants
- Property owners
- Colleges
- Advertising (media sponsor)
- Meals
- Transportation
- Accommodations

## Sponsorship

Securing sponsors and partners in the community could help with the expenses the project will incur. Good sources to approach are local government, institutional agencies, business associations, industry, chambers of commerce and service clubs (i.e. Lions, Rotary, Knights of Columbus). These sources will have an invested interest in your community and if approached in an appropriate and timely manner (i.e. do they have a specific sponsor request form, do they have deadlines for budget considerations, have they already contributed to any charities or causes this year), they could be very interested in helping to bring about this project. Try to secure funding early in the planning stages. For tips on how to approach sponsors see **SECTION 9.4 – APPENDICES**

## Preparing a proposal

To assist in securing funds, a proposal making a case for support could be developed for your potential sponsors. A short document outlining the issue, the goals, objectives, key messages, benefits to the community of hosting a design charrette as well as benefits of sponsoring a charrette could be developed into a proposal format. You may also want to include an event and task timeline, when will the charrette take place, how many days will be scheduled to accomplish the task and what is involved, so the sponsors will know when and how their donation will be used. For an example of what to include in a proposal, refer to **SECTION 9.5 – APPENDICES** in this guide.

## When to hold the event

A charrette can be held at anytime of the year, however, it might be better held in the colder months or warmer months, depending on the issue. Your organizing committee will need to take those factors into consideration when a timeline is scheduled. You may want to pair the event with some other community event, such as Architecture Week,



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Environment Week, Earth Day or any community event that draws a large crowd. This can help with community involvement and participation.

### **Order of Tasks**

An event such as a charrette must be carefully organized; making sure no detail is left out. The following is a suggested order of tasks to go by to help ensure all aspects of the charrette have been considered and are done within a reasonable timeframe.

#### *3-6 months before*

- Identify your issue
- Recruit an organizing committee from the community and elect chairperson
- Secure sponsorship
- Recruit a design team

#### *1-3 months before*

- Secure venue
- Confirm dates of charrette
- Prepare a timetable for tasks to be complete
- Book accommodations
- Make initial contact to media

#### *1 month before*

- Book all equipment rentals
- Send out invitations for presentation event
- Organize staff for event
- Confirm catering details
- Confirm accommodation and travel details
- Contact with the media
- Send out information kits

#### *2 weeks before*

- Place any ads in print media
- Re-confirm all details

## **SECTION 4 – PREPARING FOR THE CHARRETTE**

### **Selecting Volunteers for the Design Team**

The design team (the team who will actually do the design work during the event) will require some participants from the design industry. This could include professional architects, landscape architects, engineers, interns, municipal planners and developers, design students or even contractors. How many will depend on the issue, budget, time, availability and how detailed the study will be. You may want to recruit members from within the community or those from outside.



You may want to put the task of recruiting volunteers for the design team near the top of your task schedule. As you will be asking for their time as a volunteer it may be difficult to coordinate with everyone's schedule. Giving them notice several weeks to months in advance will help make sure you have a good range of skilled volunteers.

Once your team is in place and you have every volunteer's commitment, an information kit including details the team needs to be aware of (i.e. historical or background information, maps of the area, photos, statistics, and zoning regulations) could be provided to them weeks in advance of the event. If team members are aware of issue details prior to the event, time spent familiarizing them with specifics will be cut, helping to keep the charrette on schedule. It may also be helpful to include a listing of the design team contacts. For a sample list of items for an information kit see **SECTION 9.6 – APPENDICES**.

**\*\*To avoid any confusion of team responsibilities, you may want to consider mapping out what you expect of each volunteer. For example, you may have recruited some local high school students for tasks such as photocopying and refreshment replacement, while the architectural volunteers will be there to design.**

Your resources can come from your community or for a list of resources where professional contacts can be made, refer to **SECTION 7 – RESOURCES** in this guide.

**TIP:** Remember that your design team will be more successful if it is made up of volunteers from a broad range of backgrounds. However, be aware that this is a volunteer position and you may not be able to acquire someone from every discipline.

Professional skills:

- urban designers
- architects
- engineers
- landscape architects
- contractors

Other beneficial qualities to the team could be volunteers with experience in:

- property development
- community development and planning
- economics and finance
- skills such as management, presentation, (to be able to effectively relay the ideas and results during presentation)
- Computer skills such as Power Point, Internet use, document developing in Microsoft Word (for the development of the report and presentation)
- Technical skills – computer hook-up, digital projector use, etc.

## Venues

Your design team will need a venue in which to carry out the tasks necessary to complete the design charrette. You may consider the following venues:

- Hotel conference room



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- Library
- Town hall
- Community Centre
- Local Arena
- Banquet halls
- Schools (art departments in particular)
- Vacant shop fronts

Venues need to be large enough to hold brainstorming sessions, design tasks and perhaps public meetings and presentations. Be sure they are also able to accommodate several computers, have access to photocopiers, Internet access, two or more telephone lines and are equipped with necessities such as nearby washrooms and a kitchenette or refrigerator. The venue may be one of the gift-in-kind items you may be able to negotiate with a sponsor.

### **Equipment and Services**

During the event, the design team will require several services at their disposal in order to efficiently carry out the task. These services could include a sufficient workspace, design equipment and drafting supplies, computer and Internet access and perhaps administrative support. For out of town team members, making arrangements for accommodation and travel should be taken into consideration as well. For a checklist of suggested items refer to the Equipment and Services checklist under **SECTION 9.7 – APPENDICES**.

### **Media Relations Before, After and During**

If you choose to notify the media of the design charrette taking place in your community, compile a list of contacts from local media outlets and find out who is responsible for community issues, community development, interest stories etc, prior to the charrette to build relationships. Contact these people at least a month prior to the event and inform them what will take place and if they feel it will be an interesting assignment for them to follow up on. Reporters will appreciate the “heads up” and it can become an incentive to potential sponsors that their association with the project will be mentioned in the local media.

After making initial contact, keep them updated as news develops with the projects progress. If the municipality is involved with the project, make sure their communications department is updating with statements from their offices as well.

Be sure to designate one member from organizing committee as the media spokesperson. This will help to keep all messages consistent.

### **Media releases**

One week before the event, send out a media release to all media outlets in your area giving them the, who, what, where, why, when and how of the scheduled event. During the event it may be useful to keep them updated with daily media releases or just invite



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them to the final presentation at the end of the charrette. This will give them a chance to speak to the team members. For steps on how to write a media release and for a sample release see **SECTION 9.8- APPENDICES**

## **SECTION 5 – THE CHARRETTE**

### **Itinerary – The components of a charrette-**

The length and schedule of timing of each charrette will vary depending on the issue. The components that will fit into a charrette have been outlined below. It will be up to your committee to develop a suitable timetable to accommodate all of the components.

#### **Design Team Update**

The charrette will usually always begin with updating the design team with an overview of the task at hand. Initial topics that could be discussed are:

- What's wrong with the current situation?
- What's right with the current situation?
- What are our goals?
- How do we achieve them?

Items that can also be discussed during this time can be similar to the items in the information kit sent to the team prior to the event. After team has been updated, they can begin brainstorming with ideas and suggestions for the final report.

#### **Brainstorming**

During the brainstorming portion of the charrette, the team will begin to generate answers to the questions posed during the initial update and overview portion of the charrette. As ideas come up, a designated note-taker can keep track of the ideas and suggestions (and any questions that may arise) on flip chart paper, so the team will have constant access to them during the session.

#### **Design Process**

The design process of the event is a more hands-on process. This portion of the charrette allows the team to put their ideas and suggestions to paper and begin work on creative planning and design. This, along with the brainstorming session will likely be the longest sessions of the charrette.

#### **The Report**

The development of the report process is very important in ensuring the ideas come across as the best possible ones for the issue. This report will be analysed by the community and organizing committee who will decide if the suggestions will improve their community's situation.



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The report could take on the following format:

- Introduction – Why the charrette was organized and what should now follow
- Overview – Present the facts
- Issues – Discuss the main issue
- Recommendations – What should be done (long and short term goals), what strategies would be best used

The organizing committee may want to proof read the document for items such as spelling, grammar and appropriate format. The final report should consist of a clear strategy (or strategies) to assist the community in laying the groundwork for carrying out a solution to the issue.

### **Presenting the Report**

The final presentation can be a publicized event or press conference with the Mayor and members of the municipal council in attendance, or it may be just the design team meeting with the organizing committee to go over the final proposal. Again, this depends on the complexity of the issue.

If you are holding a public event, a good way to present the report is to have the presentation lead by a skilled public speaker from the design team. An exhibit of photo's and models and a power point presentation can aid the presentation. It might also be helpful to have team members present in order to answer any questions.

**TIP:** Presentation of the report is not unlike organizing another event altogether. The organizing committee will have to take the following into consideration:

- Venue (is the charrette venue available to be used?)
- Media coverage
- Guest list (sponsors, community at large, municipal reps etc.)
- Several copies of the report available
- Logistical items such as, chairs, tables, screen for presentation, podium, sound system, digital projector, laptop – committee member who is experienced at setting up digital projector, laptop, sound system, etc.
- Refreshments (coffee, tea, juice, pop, snacks appropriate for time of day i.e. breakfast baked goods or afternoon cookies)
- Thanks to the team members.



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## **SECTION 6– AFTER THE WORK IS DONE**

The charrette is finished, and now the community's work will begin.

### **Follow-up**

Follow-up action by the community organizing committee should be taken immediately after the charrette. The method might be as follows:

- Review of report with community leaders – coordinated by the organizing committee
- Implementation meetings or workshops – coordinated by the organizing committee
- Team visit – original team members to come together to discuss community achievement and to offer any suggestions
- Continuing public relations program – maintain relationship with media with updates to keep momentum and community interest

## **SECTION 7 – PROBLEMS THAT MAY OCCUR**

Even the best of organized events will have some problems. Here are a few that may come up during your preparation. Be aware of them in order to deal with them promptly.

- Lack of information
- Lack of interest from organizing committee and design team
- Lack of involvement of key officials and other key community members, groups or organizations.
- Logistical failures
- Lack of adequate lead time
- Design team confusion of responsibilities and roles

## **SECTION 8 – RESOURCES**

- For a listing of architects visit the OAA Web site at [www.oaa.on.ca](http://www.oaa.on.ca) and click on Find an Architect
- For a listing of landscape architects visit the OALA Web site at [www.oala.on.ca](http://www.oala.on.ca)
- For a listing of interior designers visit the ARIDO Web site at [www.arido.on.ca](http://www.arido.on.ca)
- For a listing of engineers visit the PEO Web site at [www.peo.on.ca](http://www.peo.on.ca)

*To contact students in the design field:*

### **Schools of Architecture in Ontario:**

University of Toronto, *School of Architecture, Landscape and Design – Toronto*  
[www.ald.utoronto.ca](http://www.ald.utoronto.ca)

University of Waterloo, *School of Architecture – Waterloo*  
[www.fes.uwaterloo.ca/architecture](http://www.fes.uwaterloo.ca/architecture)

Carleton University, *School of Architecture – Ottawa* [www.arch.carleton.ca](http://www.arch.carleton.ca)



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Ryerson University, *School of Architecture Science – Toronto*  
[www.ryerson.ca/programs/arch.html](http://www.ryerson.ca/programs/arch.html)

If your charrette is building focused, you may want to consider team members from the colleges in Ontario who provide architectural science programs as college programs are focused more on building technology.

**Colleges in Ontario providing Architectural Science programs:**

Algonquin College of Applied Arts and Technology – Ottawa [www.algonquin.on.ca](http://www.algonquin.on.ca)

Confederation College – *Thunder Bay* [www.confederationc.on.ca](http://www.confederationc.on.ca)

Georgian College – *Barrie* [www.georgianc.on.ca](http://www.georgianc.on.ca)

George Brown College- *Toronto* [www.gbrownc.on.ca](http://www.gbrownc.on.ca)

Humber College of Applied Arts and Technology – *Toronto* [www.humberc.on.ca](http://www.humberc.on.ca)

Mohawk College – *Hamilton* [www.mohawk.on.ca](http://www.mohawk.on.ca)

Northern College - *Timmins* [www.northernc.on.ca](http://www.northernc.on.ca)

Sheridan College – *Oakville* [www.sheridan.on.ca](http://www.sheridan.on.ca)

Sault College of Applied Arts and Technology – *Sault Ste. Marie* [www.saultc.on.ca](http://www.saultc.on.ca)

St. Clair College – *Windsor* [www.stclairc.on.ca](http://www.stclairc.on.ca)

## **SECTION 9 – APPENDICES**

9.1 Sample Mission Statement

9.2 Roles and Responsibilities of the Organizing Committee

9.3 Sample list of Expenses to Consider

9.4 Approaching Potential Sponsors

9.5 What to Include in a Proposal

9.6 Sample Information Kit

9.7 Equipment and Services

9.8 What to include in a Media Release/Sample Media Release

### **9.1 SAMPLE MISSION STATEMENT**

#### **Historic Post Office Rejuvenation Project**

Anywhere's turn of the century post office, no longer in use, on Main St. was declared a historic landmark over 50 years ago. Sadly, over recent years, the building has begun to deteriorate.

Several restoration solutions have been put forward over the years, however, no follow up action to restore the building or reclaim it as a functioning part of the downtown core has ever been put into place.

It is proposed to organize a local design charrette in the fall to generate sustainable and functional ideas and suggestions to restore the building. A strategy outlining short and long-term goals will be drawn up and ideas of restoration will be created. The design team will take into consideration the restoration of the deteriorating areas of the building and the fact that Anywhere has a need for a new municipal run childcare facility.



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A written report of the design teams work will be available for all community members to view.

## **9.2 ROLES AND RESPONSIBILITIES OF THE ORGANIZING COMMITTEE**

The roles and responsibilities of the organizing committee must include all areas of the event. In addition to making a long-term commitment to the project, all members must take part in the development of such things as:

- Development of a mission statement and defining the issue
- Determining the length of charrette
- Defining the types of volunteers best suited to the issue
- Development of a media strategy
- Development of a sponsor list

It may be helpful to divide the responsibilities of the committee into categories and delegate members to each of the sub-committees. For example, you might divide it up into sponsorship, volunteers, media, logistics, information gathering, event day organization and presentation organization.

### **Sponsorship**

This sub-committee will concentrate on approaching sponsors and securing funds and services for the event

- Create letters to potential sponsors
- Send letters and make initial contact
- Main contact to sponsors to answer questions etc.
- Negotiate services or funds
- Request logos for any printed material
- Ensure logo or sponsor mention is on all materials for recognition
- Ensure all sponsors are on list for thanking during presentation

### **Volunteers (the design team)**

This sub-committee will concentrate on approaching the most appropriate volunteers for the charrette and work with them until the charrette.

- Research where and how to contact the appropriate volunteers
- Make and maintain constant contact with volunteers
- Confirm involvement
- Update volunteers on event development until event day
- Make any travel or accommodation arrangements for volunteers.

### **Media**

This sub-committee will concentrate on making relationships to the media and selling the idea. Media coverage before during and after the event will help to gain and maintain community interest.



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- Make initial contact with the media
- Implement media strategy
- Maintain media communication before during and the event
- Create media releases
- Prepare media kits for presentation (can include background information, mission statement, report from charrette, contact information)

### **Logistics**

This sub-committee will concentrate on acquiring items such as the venue, equipment, catering etc

- Secure venue
- Create list of equipment needed
- Make sure all equipment and services are available to design team
- Communicate to venue to secure items such as tables, chairs, and Internet hook up, care-taking etc.
- Plan for refreshments and meals for design team throughout event

### **Information gathering**

This sub-committee will concentrate on putting together the information package that will be used for the design team and throughout the event.

- Create information kit (see Information Kit in Appendices for items)

### **Event Day Organizers**

This sub-committee will concentrate on the mechanics of the actual event: making sure all team members have arrived, making sure all equipment needed is available and functioning etc. This sub-committee may be a good fit for those members who may not be able to make a long term commitment to the project, but still wish to participate.

- Ensure all members have arrived at venue
- Ensure all equipment is available.
- Remain on hand for anything team may need
- Be able to respond to any emergencies

### **Presentation organizers**

This sub-committee will ensure that all details are taken care of for the final presentation. These details should be taken care of at least one month in advance.

- Book venue
- Create guest list and send invitations or make phone calls
- Arrange for items such as tables, chairs, laptop, digital projector, screen, sound system, and podium to be at the venue.
- Arrange for report to be copied for distribution
- Arrange for refreshments (if needed)
- Make sure team members and sponsors are recognized at presentation



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### **9.3 SAMPLE LIST OF EXPENSES TO CONSIDER**

The following expenses are based on an 8-member design team, and a 4-night 5-day charrette:

Transportation (*to and from event*) – \$500 (*local team members only, if you have out of town members, you may have to deal with plane or train tickets or great distance for mileage*)

Transportation (during event) – \$375  
(*bus or van to and from site*)

Accommodations - \$2720  
(*8 members x 85 per night for 4 nights*)

Venue (*rental*) - \$500

Equipment and services \$2000

(*see Equipment and Services for a list of potential items*)

Catering - \$2000

Report Printing - \$800

Miscellaneous - \$1000

Presentation event \$250

(refreshments)

Total \$10,145

Remember, the more services you are able to gain as sponsorships, the less of the cost of the charrette.

### **9.4 APPROACHING POTENTIAL SPONSORS**

#### **Who to Approach**

- Investigate who, in your community, are advocates of architecture and community revitalization. It is best to start with these groups
- Approach the local government, construction companies, service groups and clubs.
- Some items needed for the event such as computers and printers or conference rooms in hotels (for workspace) may be requested as a gift-in-kind sponsorship.

#### **Approach Method**

##### *Letter*

Be sure to discuss in your letter:

- Issue
- Exactly what you want from them (financial support or service)
- How their sponsorship will be used



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- How will the project benefit the community (and in return their business or organization)

A follow up telephone call should also be placed a week after the letter has been sent out to establish a contact and to ensure that the letter has found its way to the appropriate person.

#### *Telephone*

Speaking to the appropriate person one on one will let you develop contact with the organization or business right away. This approach can also be used to answer questions immediately to help them make their decision. They will likely request a formal letter for their records.

### **Considerations when approaching sponsors**

Investigate to find out what other projects the organization or business is currently sponsoring (if any). This shouldn't deter you from approaching them, but it may help in defining what your request will be.

### **Sponsor Benefits**

Potential sponsors will want to know what kind of recognition they will get for their funds or services. This type of project could offer recognition of the organization or business in media releases and including logos on all printed material. They also might be interested in having a representative on the steering or organizing committee.

### **Include them in the presentation**

Make sure you invite sponsors to the final presentation where you can formally thank them for their involvement. Depending on how many sponsors you have, you may invited them to say a few words at the presentation.

## **9.5 WHAT TO INCLUDE IN A PROPOSAL**

When approaching your potential team members and organizing committee, it may be best to contact them by phone initially to gauge their interest. If they are interested, then send a package with further information.

#### *Cover Letter*

Attach a covering letter to the proposal reiterating what you had spoken about on the phone. In the letter, clearly state that you are requesting their services as a volunteer for a specific amount of time,

#### *The Issue*

Clearly state why you are organizing a design charrette and describe the issue.

#### *Background Information*



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Attach a page of background information. Questions like, has the issue been raised before, has anything been done about the issue in the past, how is the issue affecting the community, what is the community's view of the issue and how will a design charrette benefit the community can be dealt with in this section.

#### *Goals/Objectives/Key Messages*

Describe what the community or organizers hope to gain from holding a design charrette, what are the goals, objectives and the key messages of the event. Also state who the target audience is for this report, municipal council members, community members, local businesses, etc.

#### *Sponsors or Partners*

State what kind of support you have from the community to have this event take place. List sponsors and partners who have already committed or those you plan to approach.

#### *Design Charrette Details*

Attach a sheet of specific details about the event. Details could include:

- Itinerary of what is to be expected to happen with a time commitment mentioned.
- Accommodation and travel plans (if needed)
- Event location (where will the work be done, hotel, library etc.)
- Expected team size
- Expected amount of work to be accomplished in what amount of time.
- Expected final report to be submitted
- Will they be expected to speak to media?
- Will the team members be required to bring any of their own equipment?

A brief, but specific, list of what you expect from your team members will help them make an informed decision of whether or not to participate and will help to avoid any confusion of what is expected from the event.

## **9.6 SAMPLE INFORMATION KIT CONTENTS**

The information kit you send to the team members should be a useful tool to help them prepare for the charrette. Try to keep it compact with just the most useful and necessary information. The following are some suggestions you may want to include in the kit.

#### *Maps*

- Location and region
- Important places/historic sites
- Parks/forests/lakes
- Roads/bus and train routes

#### *Photos*

- to set forth the character of the study area

#### *Statistics*

- Population growth or decline in past 10 years
- Projected growth or decline



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#### *Economic Data*

- Past and projected commercial and industrial values
- Where and what the jobs are
- Land values
- Tax information

#### *Zoning Regulations, Studies*

- Recent studies and reports
- Brochures used to attract industry/tourism
- Growth control measures

#### *Preservation Data*

- Historic landmark inventory
- Local history
- Archaeological and pre-history data
- Environmental concerns

#### *Contact Information*

- Include a list of design team members with their contact information (be sure to get their permission first). Also include names and contact information for organizing or steering committee if available.

## **9.7 EQUIPMENT AND SERVICES**

You may find the following helpful during the work sessions. Be sure to speak to your team members about other equipment they will need for each specific project.

### **Equipment**

#### *Workspace:*

telephones  
chairs, stools  
computers  
tables  
drawing boards/tables  
power outlets  
garbage/recycling bins  
screen for projecting power point  
digital projectors  
photocopier (or access to)  
printers (b/w or colour)  
screen for projecting power point  
large boardroom style table

#### *General Office Supplies:*

dictionary  
pocket thesaurus  
stapler



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calculator with metric conversion  
pads of lined 8 1/2"x11" writing pads  
dry eraser markers and brush  
box fold back binder clips - jumbo  
roll of adhesive back velcro tape  
post it notes - 1"x 2", 2"x 3", 3"x 3", 3"x 5"  
3 telephone message pads  
package of file folder labels  
package Avery coloured dots (for colour coding)  
box small paper clips, 1 box jumbo paper clips, 1 box 'X' paper clips  
box fold back binder clips - small  
box fold back binder clips -1"  
4 highlighter pens  
2 boxes of white chalk  
4 boxes of office pencils  
3 packages of fine mechanical pencil leads  
box ball point pens (black)  
box ball point pens (red)  
2 pairs of scissors  
2 boxes of staples  
staple remover  
bag push pins  
2 rolls of double face tape  
4 rolls of clear Scotch tape  
6 glue sticks  
1 bottle rubber cement  
4 bottles of correction fluid  
elastics

*Drawing and Drafting Supplies:*

masking tape, 3 regular, 2 thin, 2 white drafting tape  
16 Black and grey markers  
13 Pastel colour felt markers  
28 Coloured markers (miscellaneous)  
Coloured pencils (miscellaneous)  
box miscellaneous pastels (coloured chalks)  
2 large matte knives (snap off blades)  
3 small Olfa cutting knives (with snap off blades)  
3 x-acto knives with additional blades  
3 letraset burnishers  
5 mechanical drafting pencils  
leads (2 packages each HB and 2H leads, 3 packages H, 1 package each B, 2B leads)  
4 lead sharpeners  
5 metal erasing shields  
9 pink pearl erasers  
9 Staedtler Mars white plastic erasers  
drawing pens and felt pens:



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- 6 Pentel black roller pens
- 4 Berol felt tip pens
- 5 Bic micro metal point pens
- 5 Bic medium ball point pen - red
- 5 Pilot fine point felt pens - red
- Miscellaneous red, orange, green and blue felt pens
- Miscellaneous black fine, medium and heavy felt pens
- 2 Pilot drawing pens, 5 each - 005, 01, 02, 05, 08 Pilot or Staedtler disposable (pigment) drawing pens

*Miscellaneous:*

- box of small zip-lock plastic bags
- 4.5 metre tape measure
- 30' or tape measure
- extension cord
- extension cord (long) with 3 outlets
- flashlight and batteries
- electric pencil sharpener
- bag containing: Tylenol (regular), aspirin, Gravol
- first aid kit (with its own case)

*Drafting & Administrative:*

- Letraline - various sizes and colours
- file folders (letter size)
- 1 roll of velcro dots
- 3 clipboards
- 7 Architect's scales (metric)
- 1 Architect's scale (imperial)
- 3 drafting brushes
- 3 - 30/60 degree triangles
- 2 adjustable triangles
- 1 protractor
- 3 - 45 degree triangles
- 1 drawing template - miscellaneous shapes
- 2 large circle templates
- 1 French curve
- 2 flexible curves
- 1 compass
- 1 magnifier with handle

*Portfolio Case:*

- 3 rolls of 12" white tracing paper
- 2 sturdy envelops with closers for the administrative materials
- 3 rolls of 18" tracing paper
- 3 rolls of vellum
- 1 envelope of various Letraset
- roll of cord for hanging banners



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1 - 24" metal ruler, 1 - 12" metal ruler  
4 T-squares  
1 rubber cutting mat

*Presentation Day equipment:*

tables  
chairs  
laptop  
digital projector  
screen  
sound system  
podium

**Services**

care-taking  
catering – breakfast, lunch, dinner, supply of hot and cold beverage, fruit and nibbles  
computer support  
telephone lines  
transportation (to site) – bus or van

**9.8 WHAT TO INCLUDE IN A MEDIA RELEASE**

A media release is a document aiming to attract the attention of the local media outlets.

Following these guidelines can help to ensure important information is included in your release.

- The words MEDIA RELEASE should be at the top of the release, in uppercase letters
- Indicate the release timing. In most cases, use FOR IMMEDIATE RELEASE, if the information can be released right away. Otherwise, use HOLD FOR RELEASE UNTIL \_\_\_\_\_ (indicate time and date)
- List the headline. Print in uppercase letters. The headline is what makes the release stand out and is the most important point to get across. Keep it active and descriptive
- List the sub-headline (if applicable)
- Enter the date and location at the beginning of the first paragraph.
- The first paragraph is where you clearly introduce the issue that you are sending the release about. It is the hook that entices the media to read the rest of your release. This is where you can cover the, who, what, when, where, why and how.
- The second paragraph includes more of your story; you can also add a quote from someone from the steering or organizing committee.
- The rest of the release can include less important but supporting information.
- At the end of your release include –30- at the bottom of the page. This indicates the end of the media release. Everything listed about the -30- line is for release to the public.



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- Include contact information and how the media can get in touch with them for more information. Include a name, title, telephone numbers, and email address. Make sure there is always someone who the media can easily and quickly reach for follow-up.

### **9.8 SAMPLE MEDIA RELEASE**

For Immediate Release

Media contact:  
John Smith  
Tel: 123-456-7890  
Fax: 234-567-8901  
e-mail: [jsmith@city.on.ca](mailto:jsmith@city.on.ca)

January 7, 2004

#### **(Headline) Community Leaders and Design Professionals Gather to Restore Post Office**

Anywhere, ON – Anywhere’s leading community members along with local design professionals will gather next week to tackle the problem of the deteriorating post office on Main Street.

During a weeklong planning session, several community members and design professionals will come together to come up with creative suggestions and solutions to help restore and bring new life into Anywhere’s downtown core. As a place to start, they will begin with suggestions on giving the old post office a facelift.

“This is just one of the projects we hope to accomplish as part of the Anywhere’s downtown rejuvenation program,” says Chamber of Commerce member Jane Jones., “Our hope is to bring back community pride and increase tourism over the coming years”.

Several restoration solutions for the post office have been put forward over the years, however, no follow up action has been put into place. With the expertise and aid of several architects and engineers, a creative strategy with long term and short term goals can be realistically put into place for Anywhere to use as a resource in the coming years.

The planning session will take place at the Sheraton Hotel beginning May 11 to May 14. A presentation of the suggestions the team puts forward will be held at the hotel on May 14 from 10 am to 11:30 am. Community members are welcome to attend.

-30-