



## THE CHARETTE METHOD

Understanding how attitudes and behaviours are formed is a complex undertaking. It typically involves a mix of exploring how people frame their options as well as querying how they process their decision-making.

As a result, qualitative research approaches are often used. In contrast, quantitative approaches (such as surveys) provide a useful way to test ideas about decision-making but don't provide the depth of insight needed to deconstruct those processes (and, equally, cannot say much about ideas they did not include in the set to be tested).

Qualitative research methods, on the other hand, are inherently flexible. The nature of their discussion-based approach ensures the researcher can change course in response to novel or interesting suggestions from the participants. In this regard, they are much more accommodating towards novelty than quantitative research techniques.

The challenge for the researcher emerges where there are multiple stakeholder groups needing to be researched. A conventional response might be to suggest multiple focus groups but there is a better option: The Charette Method.

Charrettes have been described as "an intensely focused session that use a collaborative approach". The design is a perfect fit for complex stakeholder research projects because, by design, the method enables researchers to:

- Work with multiple stakeholders,
- · Deal with complex problems,
- · Engage a range of stakeholders simultaneously,
- Ensure all participants contribute to the outcome, and
- Deliver outcomes where there is limited time to engage.

The Charrette Method works by having a large group that splits into smaller groups, and then recombines into different groups as the method unfolds. The participants are combined and recombined by a range of variables to re-examine the issues from different perspectives (and provide some sense of trade-off of preferences). In other words, as different motivations become apparent in the workshop, the subgroups can be recombined by these behavioural segments.

Research First is a fan of the Charrette Method because running one Charrette workshop provides clients with similar feedback as running multiple focus groups (essentially six). Running a project with six focus groups could provide a similar level of insight as the Charrette but (i) at considerably greater cost and delay, and (ii) without the cross-pollination possible by the combination and recombination of participants into different subgroups. Instead, the Charrette Method addresses this criticism and provides wider and deeper insights for a similar spend.

...an intensely focused session that uses a collaborative approach

<sup>1</sup> Lindsey, G; Todd, J.A; and Hayter, S.J. (2003) A Handbook for Planning and Conducting Charrettes for High-Performance Projects, National Renewable Energy Laboratory U.S. Department of Energy, Colorado, August 2003.



## The Charrette Method typically follows six steps:



In the subgroups, the Charrette Method uses a variation of a Human-Centred Design (HCD) approach to have participants identify and co-create potential solutions to the problem of interest. The HCD approach enables participants to pass from divergent thinking, to convergent thinking, to emergent thinking. This means a Charette process the moves from **exploring** options, to **evolving** options, to **evaluating** options.

The evidence shows that restricting the time and resources available for the Charrette contributes to the quality of outcome by focusing the attention of the participants. Working with a clearly defined context (where the constraints are also clear) means the participants engage in what is known as 'bricolage' or working with what it at hand<sup>2</sup>.

Research First has three key roles in any Charrette engagement. These are:

- 1. Working with the client to design the recruitment protocol and then recruiting participants who represent those who need to be engaged in the process,
- 2. Co-designing the process tasks with the client, and
- 3. Running the process. This means ensuring the process remains on track, facilitating the process, and ensuring the problem situation (and its context and constraints) are clearly defined.

Clearly, The Charrette Method requires thorough preparation to work well. Research First has considerable experience with the process and we are happy to talk about the relevant success factors and fishhooks with potential clients.

<sup>2</sup> Willis, D. (2010) "Are Charettes Old School?", Harvard Design Magazine Vol 2 No.33, Fall/Winter 2010



## **For More Information**

Research First has a team of individuals highly experienced in qualitative research, community consultation, and facilitation. We also have a full-service operations team, adept in all manner of respondent recruitment and engagement. Furthermore, we have a dedicated team specialised in engagement with Māori, Pasifika, Asian and migrant communities.

For more information about the Charette approach, and how Research First can help with your communication needs, contact:



**Carl Davidson**Director

career in research as a practitioner, academic and author. He has crafted an enviable reputation for his expertise in consumer behaviour, research design and behavioural change. As the author of nine books about research practise in New Zealand, he is well-known both within the industry and within the halls of academia. He is an Adjunct Fellow at the University of Canterbury's

Business School, where he teaches business research methods.

Carl has a long and distinguished

carl@researchfirst.co.nz | 021709 070



**Ann Thompson**Project Director

Ann's area of specialism is qualitative research using design thinking.

Ann's innovative thinking and ability to unpack what lies behind the data has supported the commercial success of many clients. Ann is the Research Director at Research First, where she leads the research team in delivering decision-oriented and evidence-based insights to private and public organisations throughout New Zealand.

ann@researchfirst.co.nz | M 021 0269 2354

Research First Ltd Level 1, 23 Carlyle Street Sydenham, Christchurch 8023 New Zealand