

**MEMORANDUM**

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**TO: Mr. Gabriel Rojas, Chair**  
**Zoning and Platting Commission Members**

**FROM: Victoria Haase**  
**Planning and Zoning Department**

**DATE: January 5, 2016**

**SUBJECT: UPDATE – Austin Oaks PUD (C814-2014-0120), District 10**

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On September 15, 2015, the Zoning and Platting Commission postponed this rezoning case indefinitely in order to allow a charrette to take place. The Commission instructed Staff to provide an update regarding the charrette process every 60 days.

Since the last update provided to the Commission on November 3, 2015, the Austin Oaks Steering Committee, consisting of the Agent, the Owner and representatives of the immediate Neighborhood groups have met almost weekly to plan the details of the charrette that is to take place in January, 2016. City Staff was present at most of the meetings. Doug Farr, FAIA, has accepted the role as design facilitator and TBG Partners has accepted the role as design team for the charrette. A detailed schedule for the week of the charrette is attached. The following is a timeline of events that have taken place and events that are scheduled.

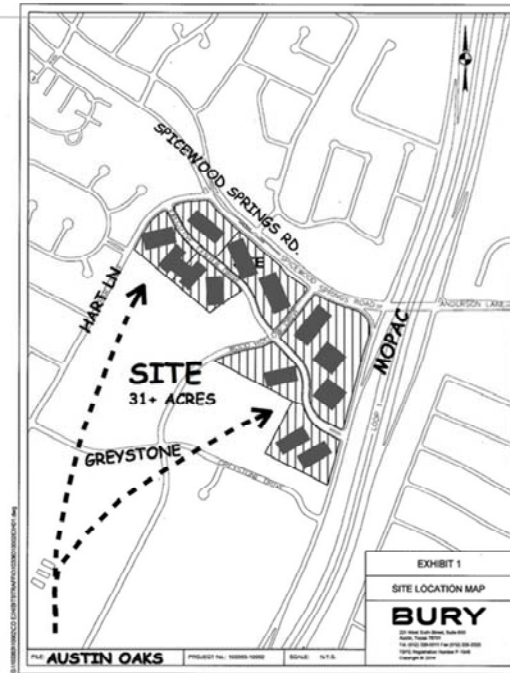
December 1, 2015 – 6pm: Austin Oaks Charrette Informational Meeting (hosted by the Steering Committee) to inform local residents and interested stakeholders of the charrette planning efforts and to seek feedback on those efforts and the process (see attached presentation).

December 2, 2015 - 11:30am: Austin Oaks Charrette Informational Meeting (hosted by the Steering Committee) to inform local residents and interested stakeholders of the charrette planning efforts and to seek feedback on those efforts and the process.

- December 16, 2015 – 1:00pm: City Staff and members of the Steering Committee met with Doug Farr and TBG Design for a walk through of the Austin Oaks Office Park property.
- December 16, 2015 - 6pm: Vision and Values Community Workshop (hosted by the Steering Committee with Doug Farr)
- January 12, 2016 - 11:30am: Vision and Values Community Workshop (hosted by the Steering Committee with Doug Farr)
- January 24-25, 2016 - Austin Oaks Charrette
- March 8, 2016 - Action required by the ZAP Commission as indefinite postponement granted on September 15, 2015 will expire on March 14, 2016.

# Welcome

Community Information Meeting  
Austin Oaks Redevelopment



This presentation was used on December 1 and December 2, to provide background information about the upcoming Austin Oaks Charrette. It includes material describing the overall process that prepares for the charrette, as well as the week-long charrette design workshop, and the implementation phase that follows.

## Session Objectives

- Introduce the working group planning the charrette
- Update you on what is happening with Austin Oaks
- Explain why we are here and what is ahead
- Describe how you participate and when
- Answer your questions



## Introductions

- Sandy Dochen, MC today, neighborhood resident
- Working Group planning the charrette
  - Ben Luckens, neighborhood resident, Charrette Project Manager (on the phone, if available)
  - Steering Committee
  - Community Involvement Committee
  - Logistics Committee
  - Officials/Staff Interface Committee
  - 16 neighborhood representatives
  - Property Owner – Jon Ruff
  - Owner's Rep – Michael Whellan



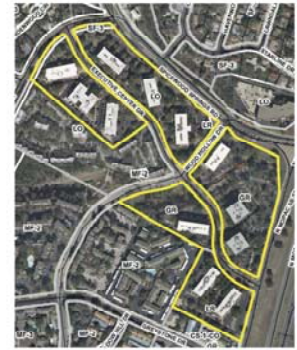
Members of the Working Group are these members of the neighborhoods surrounding Austin Oaks:

- Steering Committee: Ben Luckens (chair), Kata Carbone, Chris Edwards, Madelon Highsmith, Laurie Shanblum, Joyce Statz, Chris Wlezien, Jon Ruff, Michael Whellan
- Community Involvement Committee: Shannon Meroney and Dan Germain (co-chairs), Carol Dochen, Charlie Galvin, Sarah Pickard, Ken and Vallarie Sinclair, Kathy Vermillion
- Officials/ Staff Interface Committee: Ben Luckens, Jay Sands, Joyce Statz, Michael Whellan
- Logistics Committee: Sarah Pickard, Carol Dochen, Pam Snell

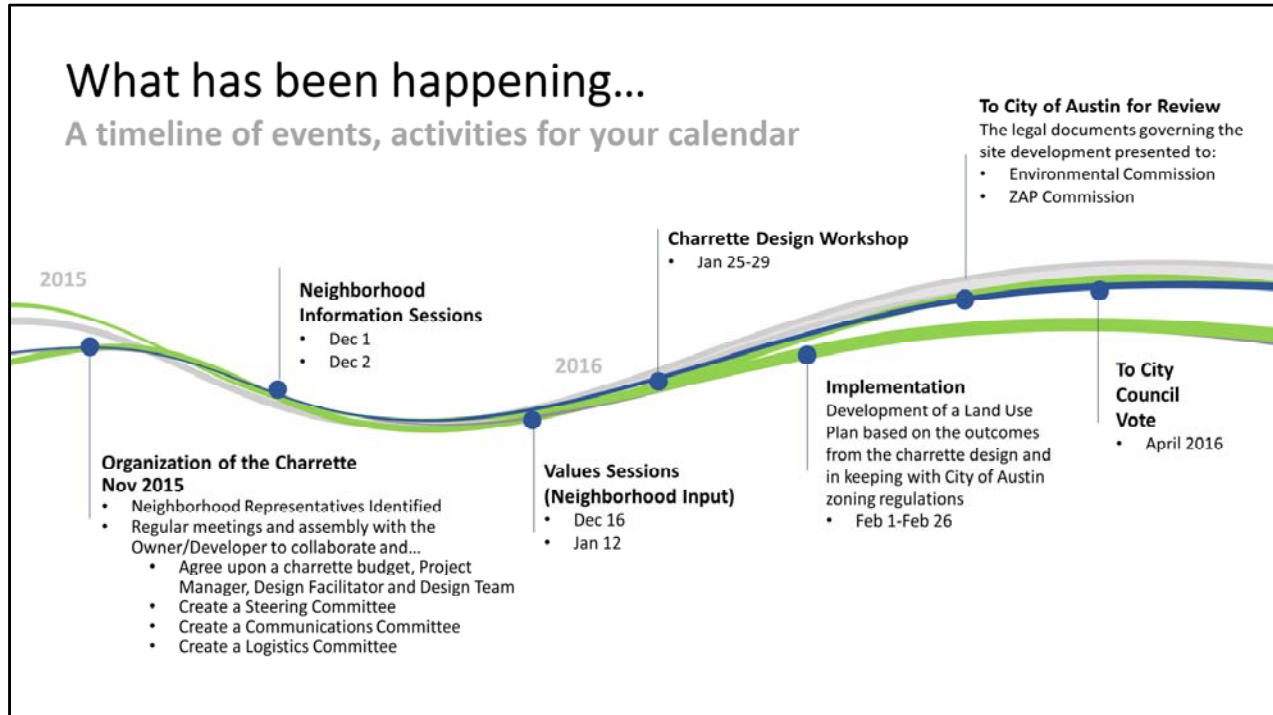
Aides to Sheri Gallo and Leslie Pool attend meetings of the Steering Committee, as does Tori Haase, the City's Case Manager for Austin Oaks.

## Austin Oaks Background – Current State

- 31+ acre site at Spicewood Springs Road and Mopac
- 12 office buildings; 8 2-story, 4 3-story; 446,091 sq. ft.
- Currently zoned with a mixture of zoning categories
  - Limited Office (LO), can be 40 feet high or 3 stories
  - Neighborhood Commercial (LR), can be 40 feet or 3 stories
  - Community Commercial (GR), can be 60 feet (5 stories)
  - Family Residence (SF-3) on a small portion, 35 foot limit
- April 2015 PUD submission proposed 7 buildings at heights varying from 80 to 120 feet – some were garages, some office buildings; also residential buildings at 60 feet



- The site currently has 12 office buildings – total of 446,091 square feet of space
- They are two and three story buildings
- Current zoning on these properties limits the height to 40 or 60 feet for the office space, depending on the tract; 35 feet for the residential on one small portion (there are 13 tracts)
- Current zoning limits percentage of building coverage to 50-75%, with floor to area ratios of .5 to 1 in some cases to 1 to 1 in others, depending on the category
- Given the trees on the property it's very difficult to estimate allowable square footage, but estimates have been made of 800,000 to 1,000,000 by different experts
- The PUD proposal was for considerably taller buildings and up to 1.4 million square feet of office space



### Key points:

- During 2014 and 2015 – much discussion, debate, and disagreement about plans for Austin Oaks; neighborhood said No to the PUD rezoning request
- In October this year, the owner changed legal representatives and met with about 15 representatives of neighborhood groups to do a reset
- Based on successes elsewhere with charrettes, neighborhood reps asked for a charrette – to get community involvement in the design of the site – and the owner agreed
- Neighborhood reps became a Working Group of 4 committees to organize the charrette
- Now doing information sessions for all interested, to be followed by Vision and Values sessions in Dec and Jan – doing one mid-day, one evening, to meet schedules of many
- Charrette set for end of January – much more info in this presentation
- Will be followed by a period of implementation –using results of the charrette to draft the zoning materials for use by the City
- Goal is to get to the commissions in March and City Council soon after, if Council approval is required

## What is a Charrette?

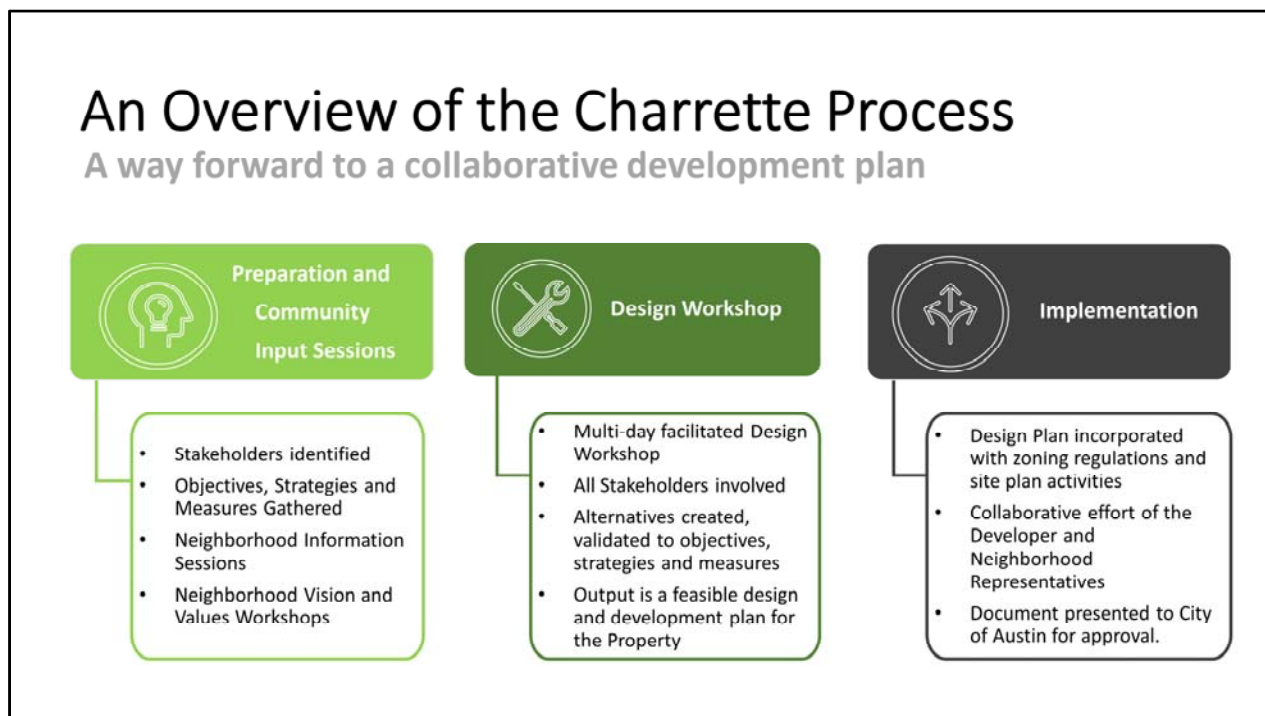
- Design approach for a site
  - An alternative to conventional negotiations
  - Has measurable objectives
  - Has a schedule
- Iterative multi-day design exercise
- Collaborative process
  - Professionals provide design and strategic input
  - Stakeholders provide local information, feedback and critique
- Cross-functional approach to problem solving
  - Multidisciplinary team
  - Input from informed stakeholders



Briefly, here is what's involved in a charrette:

- Rather than lots of back and forth between neighborhood and owner and/or owner's representative
- Establish objectives the neighborhoods and owner agree on, with measures
- Hold a multi-day design workshop – in our case a 5-day one
- Neighbors and professional designers explore alternatives together
- Use input from all relevant disciplines – leveraging expertise of consultants and City resources





The week-long charrette workshop happens after a period of education of the community, as well as opportunities to provide direction for the workshop.

Key directional input comes from the Objectives, Strategies, and Measures (OSMs) provided by the Vision and Values workshops. Examples of objectives include concerns of the neighborhood and the owner:

- Preserve the maximum number of high-value trees
- Maintain critical environmental features
- Minimize the traffic impact
- Limit building height to what is appropriate to the neighborhood
- The project will be economically feasible

During the multi-day charrette design workshop, there is collaboration of the designers and the stakeholders, as we'll explain in more detail.

All of this work drives what goes into zoning and planning documents that are then used with the City. The Working Group will be intimately involved with that work after the workshop, as well.

## What Happens in the Charrette Process?

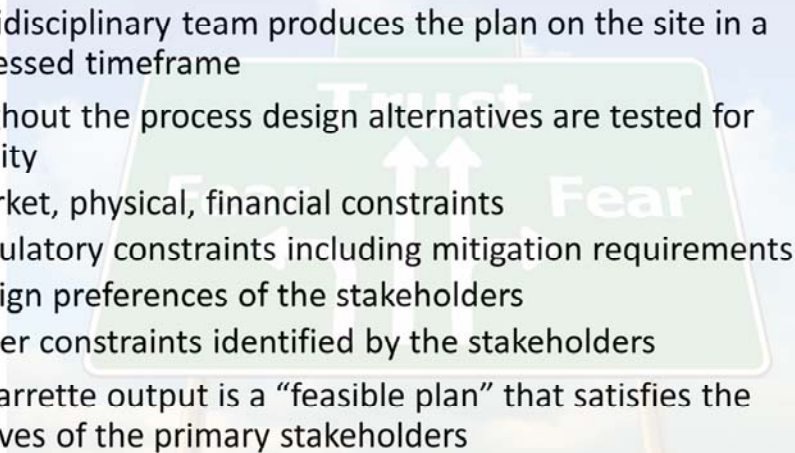


What other communities have seen is that the charrette process gets everyone involved, bringing to the table their concerns and wishes for the site.

Throughout the process, the charrette facilitator ensures that all input is welcome and is used by the design team – it's not just the professionals generating the ideas – everyone provides good faith input, and has a role in making it a success.

Thus, the experience of other communities is that they build a sense of trust – trust of their neighbors and trust of the site owner, since they've had a part in formulating the resulting design.

## What Happens in a Charrette Workshop?

- 
- A multidisciplinary team produces the plan on the site in a compressed timeframe
  - Throughout the process design alternatives are tested for feasibility
    - Market, physical, financial constraints
    - Regulatory constraints including mitigation requirements
    - Design preferences of the stakeholders
    - Other constraints identified by the stakeholders
  - The charrette output is a “feasible plan” that satisfies the objectives of the primary stakeholders

The workshop is a busy, exciting time.

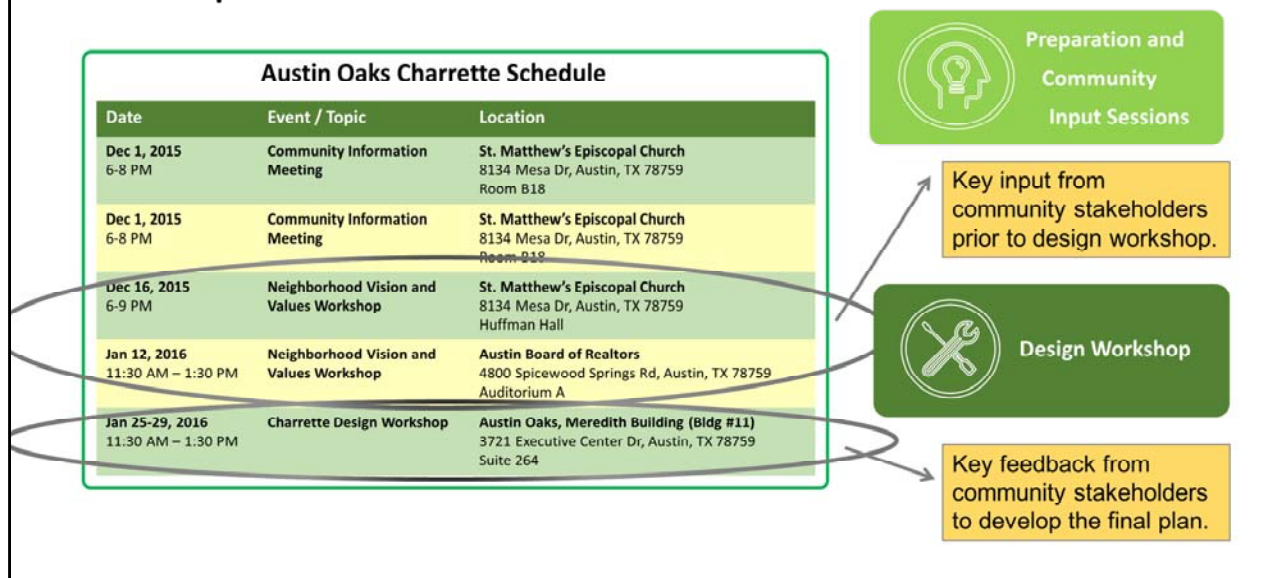
The facilitator and design team walk the site before they get started, and they use all available background information about the site. In our case, that’s reams of information that’s already been gathered and provided to City staff about the site itself – not the draft site plan, but data about the trees, CEFs, and so on.

Designers have to work fast, to incorporate everything they’re hearing.

They develop alternatives based on what they’ve seen at the site and what people have said, testing their ideas against the OSMs provided by the community.

After a series of iterations, they hone in on a single feasible plan that becomes the workshop output.

## Components of the Austin Oaks Charrette



This chart shows the dates and locations of our whole charrette process – highlighting the times you provide input during the Vision and Values Workshops as well as the Design Workshop.

We've set Vision and Values workshops at two different times of day, hoping to make it possible for everyone who's interested to attend. Each session will be similar, so attendance at just one would be appropriate, to maximize participation by all.

These will be interactive sessions for you, as will the feedback sessions at the charrette Design Workshop.

## How do We All Provide Input?

- Take part in Vision and Values Workshops
  - Brief overview of charrettes and design
  - Participant discussions of opportunities we see for Austin Oaks
  - Participant discussion of concerns regarding Austin Oaks
  - Review of draft Objectives, Strategies, and Measures from Working Group, with input to evolve them
  - Final versions drive the testing of alternative designs at the Charrette Design Workshop Jan. 24-29
- Provide feedback during the pin-up sessions at the Charrette

November 19, 2015

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Here's what will happen at the upcoming workshops.

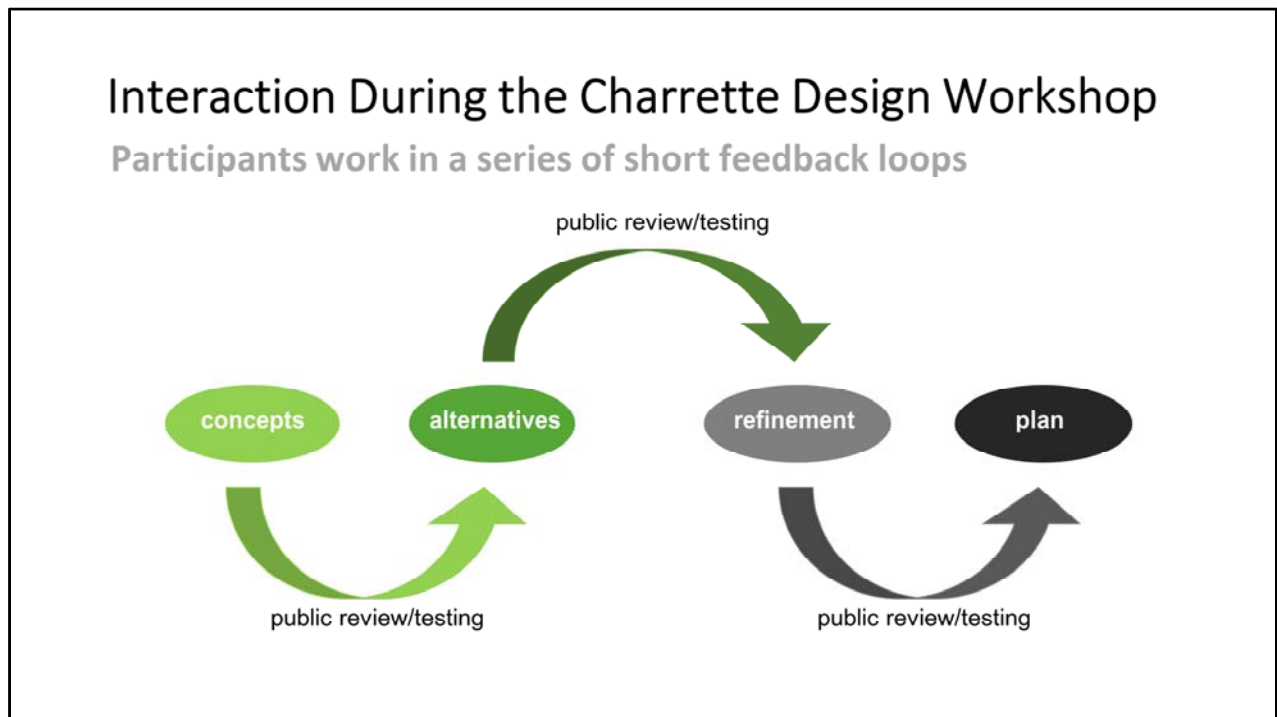
Vision and Values workshops will have brief presentations, followed by work in teams to review and respond to ideas brought to you. You'll help solidify the OSMs used to guide the charrette, as well as providing feedback on other items.

During the charrette week, there are multiple opportunities to attend and provide feedback.

The Monday sessions are informational for the design team, and the public is invited to join them.

The evening "pin-up sessions" are times when the designers show what they've been working on, and the public provides input. The Friday final presentation shows the consensus design developed through the workshop.

At other times, the public is welcome to only observe the work of the designers and facilitator working on the next iteration. It is important to not disturb work in progress.



The three evening pin-up sessions allow the public and the designers to iterate on a set of designs for the site, getting to a single one that meets the objectives of the charrette.

We expect there to be 3 or more site-wide plans (concepts) to be reviewed the first night, including one that can be done under the current zoning, and the other two based on input from the Vision and Values Workshops in December and January. From these, 2 will be derived (alternatives) and used for feedback on the second night, and a single consolidated refinement on the third night.

After each feedback session, and during the next daytime design session, the design team works quickly to incorporate the feedback and develop the next version.

## Draft Schedule for Austin Oaks Charrette Design Workshop

The workshop yields a development plan

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM		Review OSMS	Mrkt Analysis with Owner	Tech Mtg- Trans	Tech Mtg-Trans	Refinement
9:00 AM	Move in- All Day					Refinement
10:00 AM		Existing Traffic Briefing with COA Traffic	Design	Tech Mtg- Drng/Env	Tech Mtg- Drng/Env	Refinement
11:00 AM			Design			
12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Presentation
1:00 PM		Site Analysis with COA Environmental Scientist and COA Arborist	Design	Design	Design	Presentation
2:00 PM	Stakeholder Mtgs		Design	Design	Design	
3:00 PM			Design	Design	Design	
4:00 PM			Design	Design	Design	
5:00 PM		Market 101	Three Alts	Two Alts	Composite	
6:00 PM						
7:00 PM		Urban Design 101	Pin-ups	Pin-ups	Pin-ups	
8:00 PM		Opportunities/	Pin-ups	Pin-ups	Pin-ups	
9:00 PM		Constraints	Review in-put	Review in-put	Plan Refinement	

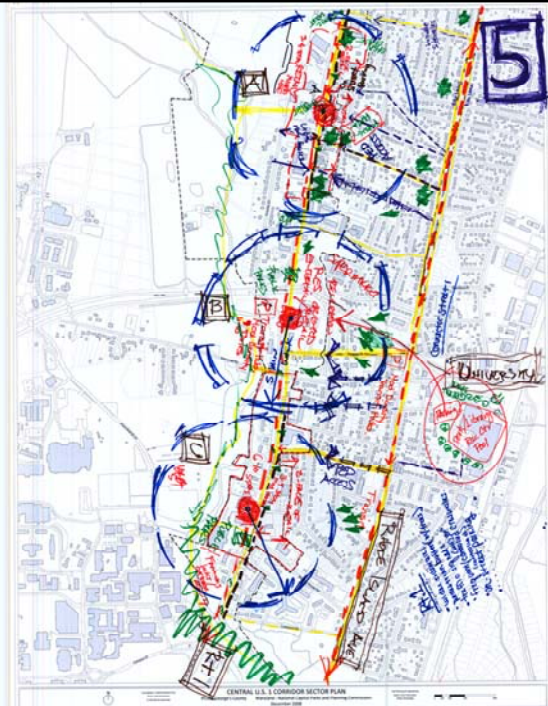
This is a draft of the final schedule. Those blocks that are highlighted in yellow are times when stakeholders are invited to come and participate. The sessions on Monday are primarily to inform the design team and design facilitator, but we're all welcome to attend. The evening sessions on Tuesday, Wednesday, and Thursday are explicitly for public feedback, and the Presentation on Friday is for all stakeholders to hear and see the charrette outcomes.

The latest schedule will be posted on the charrette web page, along with any changes that are made as the workshop proceeds.

We will have daily updates available from that web page, so if you don't get to the site to see things yourself on a particular day, you'll be able to see key elements posted via that web page. <http://nwaca.org/austin-oaks-charrette/>



So, what exactly happens  
in a Charrette Design  
Workshop?



Lots of exploration of ideas... as stakeholders and designers do their work. The results often look like the markup on this graphic!





Here are images from a range of charrettes, to give you an idea of how things will look during the week-long Design Workshop.

- Upper left – stakeholders reviewing a candidate plan or component
- Upper middle – design team members working on new things and improvements in the “design studio” of the charrette
- Upper right – briefing on some aspect of the work – perhaps an introductory session on the first day, or perhaps it’s the final presentation on the last day
- Lower left – discussion of alternatives with designer and stakeholders
- Lower middle – feedback marked up on a design component under review
- Lower right – one of the types of output we expect to see – rough drawings of what might be at the site, to go with other views of the plan that show placement of sidewalks, streets, building footprints, etc.

## A Charrette is Not

- A one-day workshop
- A multi-day marathon involving everyone all the time
- A top-down plan written by specialists
- A “visioning session” that stops short of an implementation plan
- A pre-conceived conclusion

The term “charrette” gets used for many variants of what we have described here – 2-hour work sessions to day-long workshops to more than a week of intense design work. In our case, we’ve selected a 5-day layout, which industry experience tells us matches what is usually needed to address a site of the size and character of Austin Oaks.

This charrette is not a quick design effort, but takes the time to consider both designer and stakeholder ideas.

Stakeholders can come and go – in fact, they can come through during the design times as well, but they cannot disturb the work in process.

The result is something that benefits from the input of everyone – the specialists use that input to create their candidate plans and refine them.

The result feeds into the next steps of the zoning and planning implementation process.

Charrettes have no pre-conceived solution – the best results come from approaching the workshop with a blank sheet of paper. The Austin Oaks owner has repeatedly said that we’re starting with a blank slate; we are not using what was proposed in the PUD submission by Drenner Group; we do not have any pre-defined design.

## Keys to success

- 
- Commitment to produce a feasible plan
  - Agreement on the mission statement
  - Agreement on objectives, strategies and measures
  - Stakeholder identification and analysis
  - Shared base data (mapping, studies etc.)
  - Neighborhood Values Sessions - Agreement on objectives, strategies and measures
  - Design team
  - Charrette facilitator
  - You! The Neighborhood Stakeholders

These elements are the essentials... and we have all of them in our planning .

- Commitment to produce a feasible plan – this is the commitment of the Working Group, and it is an essential part of the mission statement for the charrette
- Agreement on the mission statement – the Working Group created a mission statement that reflects the interests of both the neighborhoods and the owner
- Agreement on objectives, strategies, and measures – the Working Group has been drafting and discussion these, and the upcoming Vision and Values Workshops will gather stakeholder reaction and revise them accordingly
- Stakeholder identification and analysis has been a key focus, to be sure all surrounding neighborhood groups, HOAs, businesses, and other entities are informed about the process and invited to attend
- Shared base data (mapping, studies, etc.) – this is all the information about the existing site that describes the trees, environmental features, existing topography, current traffic data, current land use, etc.
- Neighborhood Values Sessions – the Vision and Values workshops described in a prior slide
- Design Team – TBG Partners from Austin
- Charrette Facilitator – Doug Farr from Farr Associates, Chicago
- You... the neighborhood stakeholders – everyone in the surrounding neighborhoods is a stakeholder, and has the opportunity to provide input during this whole process

## Austin Oaks Charrette

- **Mission Statement:** *Create a redevelopment plan for the Austin Oaks site that satisfies the values of the neighborhood stakeholders and is economically feasible*
- We start with a blank slate
  - Innovative, creative thinking is encouraged
  - Multiple designs will be created during the charrette, evolving to a single consensus-based design as an output
- We get a land use plan that will be used as the basis for zoning of the site and its subsequent site plans

The mission statement was jointly developed by the Steering Committee for this effort and vetted with all of the Working Group.

The owner agrees – nothing is off the table... be creative and innovative. We will build the zoning case based on what comes out of the charrette. The zoning case (using whatever vehicle is most appropriate) will document the conditions agreed to in the Design Workshop into an enforceable legal agreement between the owner and the City of Austin.

## Austin Oaks Charrette Details

- January 24-29, 2016
- Charrette Location: Austin Oaks Meredith Building (Bldg. #11), Suite 264, 3721 Executive Center Drive
- Organized by NWACA, Balcones Civic Association, Williamsburg HOA, Allandale NA, North Shoal Creek NA, NW Austin Neighbors Coalition, and Spire Realty
  - Selected Doug Farr/Farr Associates from Chicago will be the design facilitator
  - Chose TBG Partners from Austin will be the design team
- You are the stakeholders!

Here are the details of the charrette week.

The neighborhood representatives in The Working Group picked a charrette facilitator who is a recognized expert in doing charrettes. After examining the credentials of several experts, we chose Doug Farr from Chicago. Each of the candidates was from out of town, to ensure we had an objective eye on our charrette project. We picked a design team from Austin who would be knowledgeable about our area, Austin culture, and Austin regulations; and who would be available if needed after the charrette.

## A Successful Charrette Includes **Implementation**

The output from this charrette will become the basis for an Austin Oaks zoning case and for subsequent site plans



For other communities who have used charrettes, the real test is in the implementation. As the earlier slide on the timeline showed, our Design Workshop will be followed by at least a month of work by the Working Group and the property owner to put the agreed-on redevelopment plan for the site into language that can form the zoning case for the Austin Oaks site. The form of that language is yet to be determined, but during the process, the public will be kept informed and engaged. Once the material is put together, it is likely to proceed through the standard City processes that may involve the Environmental Commission, the Zoning and Platting Commission, and City Council. Each of the steps of the process includes public hearings, where stakeholders are able to voice their concerns and/or support.

There are many examples of how charrettes have worked well throughout the country. You're invited to look around the web for examples. An excellent resource is *The Charrette Handbook*, available from the National Charrette Institute's web site. There is a section which describes three case studies in considerable detail.



## Farr Associates- Colony Park



Our design facilitator is a recognized expert in the design community. Here's an example of the work of his team, just so you can see the form – the kinds of output that come from a charrette. This is not intended to illustrate Austin Oaks at all!

To learn more about Doug Farr, visit the web site for Farr Associates, [www.farrside.com](http://www.farrside.com). It includes profiles of some of the spaces their firm has designed, as well as articles about their work and their awards.

Mr. Farr is a sustainability expert, with a recent book on Sustainable Urbanism.

## TBG Partners- Watters Park



Our Design Team (TBG) does several of these each month. One of them is shown here. Again, this is an example of the output, not related to our charrette.

TBG Partners is based in Austin, with 28 years in the design and architecture business. They have done many projects in the Austin community and understand the local culture and values. Their charrette experience ranges across Texas, from city-wide plans to efforts for small development sites. They are well-versed in urban design and City of Austin code.



## Questions? More Information?

- Write your question on one of the cards provided
- Raise your hand and a Working Group member will pick it up
- Our Emcee will ask the question and a member of the Working Group will provide an answer
- Any questions we can't get to today will be answered on the Austin Oaks Charrette web page
- Questions/comments to: [aucharretteinfo@gmail.com](mailto:aucharretteinfo@gmail.com)
- Latest info on the charrette: <http://nwaca.org/austin-oaks-charrette/>

Additional detail can be found using the link above, including the handout that was provided to attendees of the December 1 and 2 sessions.

Austin Oaks Charrette Schedule	Sunday - Jan 24	Monday - Jan 25	Tuesday - Jan 26	Wednesday - Jan 27	Thursday - Jan 28	Friday - Jan 29
8:00 AM	Move in- All Day	Review Objectives, Strategies and Measures (OSM's) Existing Traffic Briefing with COA Traffic Engineer	Mrkt Analysis with Owner Design Design	Tech Mtg- Trans	Tech Mtg-Trans	Refinement
9:00 AM						Refinement
10:00 AM						Refinement
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12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch	Presentaton
1:00 PM	Stakeholder Mtgs	Site Analysis with COA Environmental Scientist and COA Arborist Market 101	Design Design Design Design Three Alts	Design	Design	Presentation
2:00 PM				Design	Design	
3:00 PM				Design	Design	
4:00 PM				Design	Design	
5:00 PM				Composite		
6:00 PM						
7:00 PM		Urban Design 101	Pin-ups	Pin-ups	Pin-ups	
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11:00 PM						