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EXPRO El Salvador
Programa de Promoción de Exportaciones
para las Micro, Pequeñas y Medianas Empresas

DESIGN PRODUCTION CENTER FEASIBILITY STUDY

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Export Promotion for Micro, Small and Medium Enterprises El Salvador (USAID/EXPRO)

Contract No.: PCE-I-00-98-00016-00 T/O 833

Project Period: July 2003 – March 2006

USAID Mission: USAID El Salvador Office of Economic Growth

Project Contractor: Nathan Associates Inc.

Project Summary: USAID/EXPRO aims to reactivate the economy of El Salvador by increasing income generated from exports of micro, small, and medium enterprises (MSMEs). Project objectives include (1) strengthening the Ministry of Economy's institutional export and trade policy capacity; (2) improving access to trade and export information; (3) increasing the competitiveness of Salvadoran businesses; (4) expanding business contracts and sales; (5) strengthening the Salvadoran export services sector; and (6) establishing strategic business alliances. Nathan Associates, in collaboration with AG International, DAI, and JE Austin, is providing technical, commercial assistance, and training to support government and private sector export promotion efforts; improving the productive capacities of MSMEs striving to access international markets; and assisting Salvadoran companies in developing and increasing export sales by at least \$20 million at project completion on March 31, 2006. USAID/EXPRO is also providing technical assistance and training to make export promotion initiatives more effective and to improve product development, operational efficiency, business development services, and the production scale of Salvadoran MSMEs so they can enter international markets, enjoy market continuity, maximize profitability, and face less risk of failure.

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DESIGN CENTER
Feasibility Study

Submitted To:
USAID/EXPRO El Salvador

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1.0 Summary

EXPRO is currently considering a production center for the furniture and home furnishings sector.

One of the initial tasks of this process is to collect information and review the current procedures followed by other industries, in particular the furniture industry, concerning the use of production centers. This report describes the major components of production centers, summarizes the practices of other industries utilizing similar production center models and outlines the process of implementing a pilot production center.

The information gathered shows that production centers have proven to be a successful approach to creating products in today's highly competitive global market. This report found that the use of production centers can achieve savings in product development time and a reduction in cost, expand the potential for the development of innovative products never before considered, improve product quality and enhance the perceived value of products by consumers. Most importantly, production centers can increase profits for the manufacturer resulting in increased wages and benefits for employees.

The key that unlocked the "best practices" models used in private industry was to understand the terminology; the term "production center" is used in the furniture industry, the term "design studio" is used in the automobile industry, the term "design-build" is used in the construction industry, in the fashion industry, design, marketing, merchandising, image and sales all coalesce under a designer's name and the term "design firm" is used in the high-tech industry. But all these entities use strategic design thinking to deliver a competitive advantage for a manufacturer, owner or corporation.

2.0 Background

In the 60's, 70's and even the 80's design was mostly about the look of a product. Design was not a word you associated with experiences, services, or communications. More importantly, it wasn't something you inevitably linked to innovation and competitive advantage.

Today we are in the midst of a revolution in business - a revolution led by design. Design is at the heart of how companies differentiate themselves in the global market. Since most companies do no more than match the competition on price, quality, and technology, there is no choice but to embrace design as a way to gain a distinctive edge.

Design today is not only the look of a product; it is a strategic thought process that determines the direction of a company. It is a transformative force in the creation of viable, innovative and sustainable ideas, products and services. The process of design thinking moves through three focused activities i.e., direction, design, and development. Design thinking sees future markets and maps relevant opportunities. Design thinking

offers design solutions to companies. And design thinking ensures design integrity in the final product.¹

The complex, multidisciplinary challenges of the twenty-first century demand that leaders of change understand problems from multiple perspectives and integrate these perspectives into creative solutions. For example, integrating design and product development into the strategic plan for growth of the Salvadoran economy. Design can no longer be left out of the equation for developing companies or developing countries. It must be woven from the beginning, into the complex web of global markets and can lead a small developing country like El Salvador from a commodity economy to an entrepreneurial economy.

This report answers the question, "how do you create competitive products in today's global market?" El Salvador must compete in the global export marketplace; there is no other choice. With market access comes increased design pressure. With all the competition out there you are either remarkable or invisible. In the rush to access the U.S. market many micro, small and medium enterprises (MSMEs) in developing countries, bypass strategic thinking across key disciplines in order to achieve short-term results. The number one determinate of success that MSMEs in developing countries often overlook is design, image and product innovation.

Most business consultants will tell you that they have spent the bulk of their time over the past decade setting precise goals for improvement and ways to measure that improvement. Now it is no longer enough to get better. You have to "get different." In order to "break out" from the sea of MSMEs in developing countries, all competing for the same manufacturing partners and contracts, a country must have a strategy. That strategy should be to develop an entrepreneurial economy. It is design and innovation that is the catalyst to an entrepreneurial economy. Economic competitiveness is the only way to combat falling wages and societal deterioration. El Salvador must evolve from a commodity economy to an entrepreneurial economy.

Most MSMEs feel they lack the capital to invest in the number one process that could determine their success and their future. Success in exporting does not necessarily require a high degree of sophistication. It takes the right idea for the right market niche. MSME's need to continually improve, that is a constant, but government aid organizations must understand and support design and innovation. Design should be at the forefront of any strategy for economic growth.

What many MSMEs in developing countries say is, "let's get to the trade fair, then we will fix the product," or most often heard is, "let's get the contract and then the manufacturer will tell us what to make and what it should look like." This type of thinking leads to a commodity economy. In the commodity market you compete on cheap labor. A major failure of most Latin American economies is the over-reliance on the export of commodities. The value of most commodities shipped from Latin

¹ Designworks/USA Charles Pelly

America is currently 20 percent less than it was in 1845.² It's not how you export: it's what your country is exporting.

Without design and innovation El Salvador has little to differentiate itself from other developing countries. It is impossible for El Salvador to compete with China's labor costs. Cheap Asian goods of steadily improving quality are flooding global markets. Salvadoran manufacturers are caught in a squeeze, not enough capital to invest in research and development and higher labor costs than Asian's developing economies.

Rather than waiting for an experienced European or U.S. manufacturer to choose Salvador, why not up end that notion and create a strategy of developing distinct products and brands and images? What really does come first the market or the product? It depends on whom you ask. Remember Ralph Lauren started with one tie and Martha Stewart started with a cookbook.

2.1 What is a Production Center?

Business moves at a fast pace. Business terminology does not always keep pace with the speed of change in business. Unfortunately the term "production center" is not used with any specificity. Even in the furniture industry it means two different things. First, it is used to describe an offshore center that houses marketing, design and product development teams at a central location near the factories in a particular country. It was cost effective for U.S. manufacturers to set up facilities in the country where the production factories were located. They named them "production centers." Second, the term "production center" is used when factories and suppliers are all located close to each other. This helps outside manufacturers by giving them everything they need within close proximity e.g., fabrics, wood frame production, hand painting and finishing.

The rapid rise of furniture imports from China in the last 14 years has forced U.S. manufacturers to set up marketing, design and product development teams all "under one roof" near the factory that is making the furniture. These production centers have improved the quality of products being produced in China. The production centers have streamlined the design process and as a result improved the "bottom line" for the parent company.

As the terms for design entities blur, and more often than not confuse almost everyone, this report will use the term "Design Center" instead of the term "Production Center." Even though this pilot project is focused on the home furnishings and furniture sector and "production center" is the term most often used in this sector the envisioned Center will start as a Design Center. The term "Design Center" is simple, accurate and more easily understood.

The major components of a Design Center are: 1) well established, overarching concepts that drive strategy and the design of individual products; 2) a knowledge base of cultural trends, contexts and local capacities; 3) innovative designs solutions stemming

² Harvard Business School Conference April 12, 2004 Marcela Escobari OTF

from the synergy of housing different design skills "under one roof". 4) an intense focus on the consumer and making a connection with the consumer.

2.2 What Industries use Design Centers?

More specifically, what industries use production centers, design studios, design-build, a designer's name and design firms to maximize design and innovation, control development costs and also build a competitive advantage? Specifically, the fashion, technology, construction, automobile, and furniture industries use design centers. And now services from shopping to banking to health care are all turning to Design Centers. The answer is really all industries that see design and innovation as the path to growth, jobs, income and wealth. The same is also true for countries. Italy has become the world's fifth largest economy, an exporting giant, due to its core strength in design and innovation. So why do some companies use design as a competitive advantage and others do not? Many are confused by the design process. Some are simply intimidated by designers or their preconceived notions of designers. And most have not had the time to sort out the complex changes in the design industry. The next section of this report will demystify the design process and update the reader on the most important changes in the design industry.

3.0 Best Practices

The following "best practices" were selected because they represent key disciplines and strategies in delivering competitive products to the marketplace.

In summary, a survey of "best practices" suggests that: 1) what appears to be design talent may be a learned survival skill; 2) countries need to tackle the issue of non-competitiveness by developing high-value products and services; 3) streamline product development by using a single entity and single point of responsibility; 4) create more than just products (articulate a lifestyle); 5) develop your own brands and images 6) and use a multidisciplinary approach to understand the consumer experience and create products and services that connect consumers to the product.

3.1 Italy

Best practices not only refers to private industry but also to the economies of other countries. You might say Italy cannot be a model. Italy has the world's fifth largest economy. What can a developing country like El Salvador learn from Italy? From a distance you might not notice that Italy's export companies learned to survive and thrive in a country that has suffered from decades of stifling bureaucracy, over regulation, and high taxes. Yet despite these obstacles Italy produced an army of small and midsize export companies that boast global strength in fashion, industrial design, machinery, and other niche sectors. These small and midsize companies produce 80% of Italy's GDP. A little known fact is that a burdensome labor law that required companies with more than 15 workers to pay exorbitant taxes forced companies to remain small, less than 15 workers. They were small but they were also nimble. They clustered together and constantly tweaked their products and production techniques to remain competitive with

so few workers. They could not expand so design and innovation was their only means of survival. Some would say that design, product development and innovation is a law in Italy.

Italy represents the first strategy, design as a learned skill. Today design is a part of engineering and business school curriculum. The goal of university design curriculums is to integrate multidisciplinary design pedagogy into technical and business education that will be more inclusive; offer more opportunities for understanding the complexity of design skills and create design professionals with a broader foundation for addressing the complex problems of the 21st century. Stanford University has raised \$35 million to create a Design School, to complement the Stanford University Business School. Stanford professors in business, engineering, social sciences and art will teach at the new design school.

3.2 Design Build

The design-build approach is mentioned because it is a process or a system of design and product delivery that has been so successful that it has found its way into some of the largest private and public industries. Design-build is a process that has streamlined the construction industry. The fundamental element of design-build is that one entity assumes primary responsibility for the design and the construction of a project. Starting in the late 20th century, private sector use of design-build, primarily for vertical buildings, expanded rapidly. Interest in design-build delivery spread more gradually in the public sector. Today design-build is being used not only by the U.S. Department of Defense and the power industry but also for state transportation projects. Design-build is an alternative to the traditional design-bid-build approach. The design-bid-build approach and its accepted practice of giving the contract to the lowest bidder has been troubled with cost overruns, lack of a single responsible party and countless delays. Companies who have chosen the design-build approach cite accelerated project delivery as the major factor in the decision to use design-build. Schedule acceleration is possible due to a number of factors, most importantly the consolidation of design and construction in one entity.

Design Build represents the third strategy, streamlined product development by using a single entity and single point of responsibility. Architects and contractors, engineers and designers all work within one entity to speed the design process, promote innovation by utilizing the designers' and builders' separate strengths to develop new design and construction techniques. These innovations are used to gain a competitive advantage in the selection process, as a way to cut costs in the implementation phase, and as a way to speed implementation. A streamlined approach to the design process and the building process has lowered the cost and at the same time improved the quality of the project.

3.3 Lexington Furniture

Lexington Home Brands is a private manufacturer and marketer of upholstered, leather, and wicker furniture for the bedroom, dining room, and living room. Its furniture is sold through independent home furnishings retailers, department stores, galleries, and designer showrooms in the U.S. and internationally. Some of the brands that Lexington manufactures and markets include Woolrich, Bob Timberlake, Lexington, Nautica, Smithsonian, Tommy Bahama, Waverly, and Susan Sargent. The strength of Lexington is that it articulates the emotional qualities of diverse concepts. Concepts as diverse as Woolrich, which started as a blanket company, The Smithsonian Museum, the clothing companies of Nautica and Tommy Bahama and artists Bob Timberlake and Susan Sargent. None of these companies started as furniture manufacturers yet through emotional branding they have captured many American niche markets.

Lexington Furniture represents the fourth strategy, articulate a lifestyle. Here is an example of how words and imagery create the Tommy Bahama brand; "to lend your home the feel of an elegant retreat," "we call it Paradise Found...you call it Home," "elevates the art of relaxing to fine art," and "shape your own island state of mind." This dialogue with the consumer transcends the product-only relationship and connects to powerful and timeless emotions. Recognizing that some of the most important product benefits are emotional rather than physical.

3.4 Target

This Minneapolis-based retailer pioneered the idea that low prices and good design were not oxymorons. Target put the notion of design at the core of the company's differentiation strategy. Rather than picking and choosing from what was available in the marketplace, as its competitors did, Target began developing its own brands, making sure that what customers discovered on the shelves was different, more stylish, more current, and better-designed, than what they were finding at Kmart and Wal-mart. This was a new strategy in the early 90's. Most discount-industry executives assumed that less-affluent customers were content to wait a year for knockoffs of the products sold at high-end shops. Evidently, the strategy is working. With 2004 revenue of \$48 billion, Target has blown past competitors Kmart and Sears and is now second only to Wal-Mart among general merchandisers.

Target represents the fifth strategy, develop your own brands and images. As the economy shifts from the economy of scale to the economics of choice and as mass markets fragment it is more important than ever to "connect" with the consumer.³ Robyn Waters served as vice president of trend, design, and product development at Target. Overseeing a team of 120 industrial, clothing, and technical designers, she drove the look and feel that caught the media's attention and helped Target morph from a dowdy Midwestern discounter to the trendy "Tar-zhay." "Design became the tool that made our brands consistent and let us connect with our customers," Waters says.⁴

³ BusinessWeek, May 17, 2004 "The Art of Innovattion"

⁴ Fast Company, June 2004, Master of Design

3.5 Designworks/USA and IDEO.

The design studio of BMW, Designworks/USA, is one of the world's finest international strategic-design consultancies. This design studio is a separate division of BMW and works with other clients as well as BMW. Designworks/USA is a team of multinational designers, and engineers representing disciplines as diverse as industrial design, automotive and transit design, product design and advanced communications. For more than 25 years this studio has created an array of products such as, bath fixtures for Villeroy & Boch, treadmills and exercise bicycles for Star Trac, guitars for Ernie Ball, tractors for John Deere, cell phones for Nokia as well as the exterior design of BMW's hypermodern Z4 roadster. The studio also conceived the look and feel of BMW's X5 sports-activity vehicle, as well as the 3 Series sedan. Other clients have included Whirlpool, MCI, Compaq and Haworth.

Designworks/USA was founded by Charles Pelly. He took Designworks/USA from a start-up operation in his garage to one of the top 10 design consultancies in the world. Pelly developed the unique structure of Designworks/USA with a balance of automotive, transit, product, advanced communications and graphics consulting to stimulate cross fertilization and innovative thinking among his design team.

IDEO. *We design products, services, environments and interactions.*

Ideo began in 1991 as a merger between David Kelley Design, which created Apple Computer Inc.'s first mouse in 1982 and ID Two, which designed the first laptop computer in the same year. From its inception, IDEO has been a force in the world of design. It has designed hundreds of products and won more design awards than any other firm. Ideo is best known for designing user-friendly computers, PDA's, Palm V, the Steelcase Leap chair, and consumer experiences in services from shopping and banking to healthcare and wireless communications. ⁵

Designworks/USA and IDEO are two of the top members in a small elite group of today's top design entities. They represent the sixth strategy, use a multidisciplinary approach to understand the consumer experience and create products and services to give companies a competitive advantage.

Three other firms doing similar work at this level are Design Continuum of West Newton, Ma., Ziba Design in Portland, Oregon, and Insight Product Development, in Chicago. Once thought of as industrial design firms these firms are examples of the new design ideology, multidisciplinary solutions. The roaring 90's awash in money and talent allowed these design firms to build increasingly more complex design teams. Social scientists, architects, and graphic designers, were added to staffs of industrial designers and engineers. The multidisciplinary approach took a giant leap forward. The highly competitive automobile and computer industry needed to connect to the consumer fast and these two firms now had the design teams that could do it. Then the technology bust and an economic slow down forced Designworks/USA and IDEO to rethink their financial models. These firms looked to corporations outside the high-tech and automobile industries and found that their strong engineering, design and social science

⁵ BusinessWeek, May 17, 2004 "The Art of Innovation"

capabilities were in great demand. After decades of market research and focus groups, corporations were dismayed that they still didn't really know their consumers-or how best to connect with them. Designworks/USA and IDEO's found its intense automobile and high-tech consumer focus was now in great demand not only for product development but also for services from shopping to banking to health care and wireless communication. ⁶

Witnessing Designworks/USA and IDEO's success, management consulting firms are now expanding their offerings to corporate clients to include a greater focus on the consumer. These high tech design firms now rival the traditional corporate advice "givers" the management consulting companies such as McKinney, Boston Consulting and Bain Management. Management consultants tend to look at the corporate world through a business school prism. By contrast, Designworks/USA and IDEO and others, advise clients by understanding the consumer by looking at the world through the eyes of the social scientists, designers and engineers. With today's economy of choice the focus must be on the consumer and "making the connection."
7

4.0 How the concept of a Production Center for El Salvador was developed

Global competition in the furniture industry has raised the design expectations of the consumer. Today's consumer wants affordable home products and excellent design, packaging, and image. Accordingly, knowing the U.S. market is essential. Salvadoran manufacturers cannot be expected to have a comprehensive understanding of the U.S. furniture market. It is even possible that taking manufacturers to a trade show to see the market may actually have the reverse effect of overwhelming and ultimately discouraging manufacturers.

How do innovative designs make their way to the forefront of a developing company? In the case of El Salvador, are Salvadoran manufacturers destined to go without design and product development until an outside U.S. or European established manufacturer selects them as a partner and then dictates the direction of the products? Is there a way to develop design skills in El Salvador and create a competitive advantage that will give Salvadoran manufacturers increased market share?

By comparing elite companies, noted in the Best Practices' section of this report, a prototype has developed. Taking a page from the bestseller, "Good to Great," key determinants of great companies have been discovered. It took Jim Collins and his research group five years, mountains of data, and thousands of pages of interviews to find these key qualities. "Good to Great" details the universal distinguishing characteristics that cause a company to go from good to great. Jim Collins, is a former faculty member at the Stanford University Graduate School of Business and co-author of "Built to Last," a national bestseller for over 5 years with a million copies in print. Identifying the seven timeless universal factors that can be applied to any organization and take that organization from good to great is a contribution to the business

⁶ BusinessWeek, May 17, 2004 "The Art of Innovation"

⁷ BusinessWeek, May 17 2004 "The Art of Innovation"

community. Likewise, though on a much smaller scale, this report attempts to demystify the concept of design.

Design is not the exclusive property of a superhuman, larger-than-life, design icon. Seemingly ordinary people can produce extraordinary results. Is design an elusive quality that you either have or you don't? Is it like singing or acting, you either have star quality or you don't? Most people are intimidated by design. They view design as a talent. They believe in stars, they don't believe in systems. The author of this report feels that the examples provided in "best practices" support the premise that disciplined, creative design is learned first through the act of a commitment to the process of design and then through the act of doing and making.

My observations while in El Salvador led me to the idea of creating a Design Center for El Salvador. The current approach of calling in a graphic designer for packaging and a furniture designer for furniture may lead to some product improvements but these design changes, on their own, cannot deliver a significant competitive advantage to the Salvadoran manufacturer.

What will lead to a competitive advantage is to first commit to design by creating a pilot Design Center. Second, to create high-value products and services at the Design Center by modeling the best in the design industry; streamlining product development, innovation and product positioning with a multidisciplinary approach to understanding today's consumer. And lastly to build on that advantage with unique brands and images that connect to the consumer.

A Design Center pilot project focused on a single sector utilizing the multidisciplinary design process patterned after elite design firms is an chance to actually create world class products unique to El Salvador. With a small pilot, you minimize risk, yet open the door to innovation and possibility.

5.0 Advantages of a Design Center for the Export Promotion Program of El Salvador.

There are a number of advantages that could form the basis for a decision to create a pilot Design Center in El Salvador. These advantages are culled from the best practices noted earlier in this report.

- A Design Center will be responsible for creating something that sells and commands a higher price. The center would allow Salvadoran manufacturers to compete for a sophisticated customer who buys products at a premium
- A Design Center will streamline the concept, marketing, and design process. It will be a place to fuse research, marketing, design and sales thus creating new business opportunities for Salvadoran manufacturers.
- The efficiency of the Design Center will lead to time and cost savings and increase the competitive strength of Salvadoran furniture and home furnishing manufacturers.

- A Design Center will combine commercial acumen with marketing skills and build sales and recognition for Salvadoran furniture and home furnishings manufacturers.

6.0 A Design Center Pilot

6.1 Assumptions

The following assumptions were made in recommending the establishment of a Design Center in El Salvador. The first assumption was that EXPRO sees the value in a supporting a Design Center pilot for the furniture and home furnishings sector of El Salvador. The design of the pilot includes the best practices of companies who are successfully using the Design Center delivery method. The pilot will optimize the benefits of proactive design and innovation and maximize the strengths and creativity of Salvadoran designers and manufacturers in teamwork with EXPRO. The second assumption was that the Design Center pilot should be able to accommodate large and small projects, new concepts and the repositioning of existing products. The third assumption was that the furniture and home furnishings sectors could be developed from a small but existing level of manufacturing capacity within El Salvador.

6.2 The Design Center Approach

The Design Center/Salvador will be a "design supplier" and an in-house partner to Salvadoran manufacturers. The Design Center/Salvador will use the Design Cluster and Aid-to Artisans as the multidisciplinary teams whose first task will be to create a context for Salvadoran products. The Center will design and market new products, and assist all manufacturers in the furniture and home furnishings sector. The Center will test products in the U.S. market with retailers, buyers and sales representatives. It will operate from the strategy of single entity responsibility and cross-fertilization of design skills, streamlining product development, and articulating a lifestyle with unique brands and images.

6.3 The Design Center/Salvador Startup

Set up office.

Meet with the design cluster, Aid-to-Artisans, the Chamber of Commerce and furniture and home furnishings manufacturers.

Identify new product opportunities, additions to existing lines, improvements and revisions, and repositioning of product lines.

Develop products following the process developed by Designworks/USA and IDEO; intense consumer focus and multidisciplinary design teams.

Meet with manufacturers to prototype and price products.

Meet with U.S. buyers.

Track orders and evaluate progress.

6.4 Marketing

The Design Cluster and Aid-to-Artisans will be engaged immediately in the design process. As the Director I will bring to the table 5 totally new product concepts. These concepts will serve two purposes. First, the design cluster and Aid-to-Artisans will immediately work on these concepts. This will serve as a workshop on what the process is and how it works. Second, the concepts will be a vehicle to engage the manufacturing and entrepreneurial community in the Design Center. If, as might be the case with a new pilot project, manufacturers are reluctant to work with an unknown quantity we will come to them with strong concepts that have been through the design process and have strong potential.

7.0 The Financial Model

The Design Center will first operate from funds provided by EXPRO and USAID and progress to a joint public and profit model. New Zealand used this approach in creating their incredibly successful film industry. New Zealand is a remote country of four million people and modest financial resources. Three decades ago they had nothing that could be called a film industry. Then in 1978, the government established the New Zealand Film Commission. Last year, New Zealand took home 11 Oscar's out of 13 nominations and "Lord of the Rings" is set to become the highest-grossing film of all time. The Film Commission started in 1978 with an annual budget of less than \$250,000. This year it is \$14 million.

When we look at the financial model of Designworks/USA and IDEO we find that 50% or more of these companies are owned by a large client. BMW owns Designworks/USA and SteeLcase Furniture Inc, owns IDEO.

Over time, the Center will increase its scope and develop its own funding from earnings realized through product development and sales and may consider finding a major investor.

By using the techniques of Designworks/USA and IDEO even in a very small pilot project focused on one sector, the home furnishings sector of El Salvador, the germ of a larger design firm servicing Central America is an exciting possibility.

The initial 12-month effort requires the engagement of a project director. The director must have the ability to articulate a vision and generate participation in the project. The director must set high design standards for the Center. As the skills and the interest of members of the design cluster are encouraged, tested and developed, leaders will emerge. After 1 year, the project would rely less on a short-term director and more on the leadership skills of members of the Center.