



INTEGRATIVE PROCESS AND ECO-CHARRETTE FOR GREEN BUILDING PROJECTS

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MODULE
05

Getting Started with Charrette

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Getting Started with Charrette

During the initial stages of the charrette planning procedure, decisions are made regarding the most important issues, participants, and optimal dates and locations. This chapter provides guidance on how to initiate this planning process.



LEARNING OBJECTIVES

- ✓ **Create a Steering Committee**
- ✓ **Hold a Kickoff Meeting**
- ✓ **Determine Event Date and Location .**

Create a Steering Committee



The first step in planning and organizing a charrette is to establish a steering committee to guide the planning process and garner support from influential individuals and organizations. Discussing the event's goals and logistics with a large number of enthusiastic and devoted people can ensure its success. This will help generate ideas and ensure the event's success.

- Five to eight individuals working closely together will improve the efficiency of the planning process. Effective steering committee members typically include:
 - Represent a variety of interests:
 - Owner and/or owner's representative(s)
 - Charrette organizers
 - Overall facilitator
 - Local community leader(s)
 - High-profile stakeholder(s)
 - Overall project champion(s).
1. Demonstrate good organizational skills.
 2. Encourage and accept new ideas.
 3. Identify and engage potential participants, partners, and speakers.



Hold a Kickoff Meeting



Start planning with a steering committee kickoff meeting. A kickoff meeting helps define steering committee roles and prioritize tasks.

The steering committee can hold the kickoff meeting in person, by conference call, or by videoconference. Kickoff meetings usually last 1–2 hours. The kickoff meeting should shape the event, not make final decisions. Before the kickoff meeting, have steering committee members review Appendix A's checklist for high-performance project charrettes. Talk about:

- Purpose
- Type and length
- Resulting products • Agenda
- Location
- Date
- Resources to cover or defray costs
- Participants
- Motivational and educational speakers
- Facilitators to lead the charrette and breakout groups
- Partners to supply resources or buy into the charrette process and its results, or both • Project information for participants
- Pre-design energy analysis before the charrette
- Date, time, and logistics of the next steering committee meeting



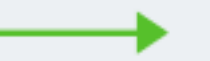
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Purpose

- Determine with great care the objective of the gathering, as well as the qualities and experiences of the participants that are required to realize that objective.
- The purpose will have an impact on the format, as well as all the other decisions made during the planning process.
- The likelihood of an event being successful and participants feeling like their participation was worthwhile will both be increased by having a solid understanding of the characteristics of participants and the outcome that was intended.

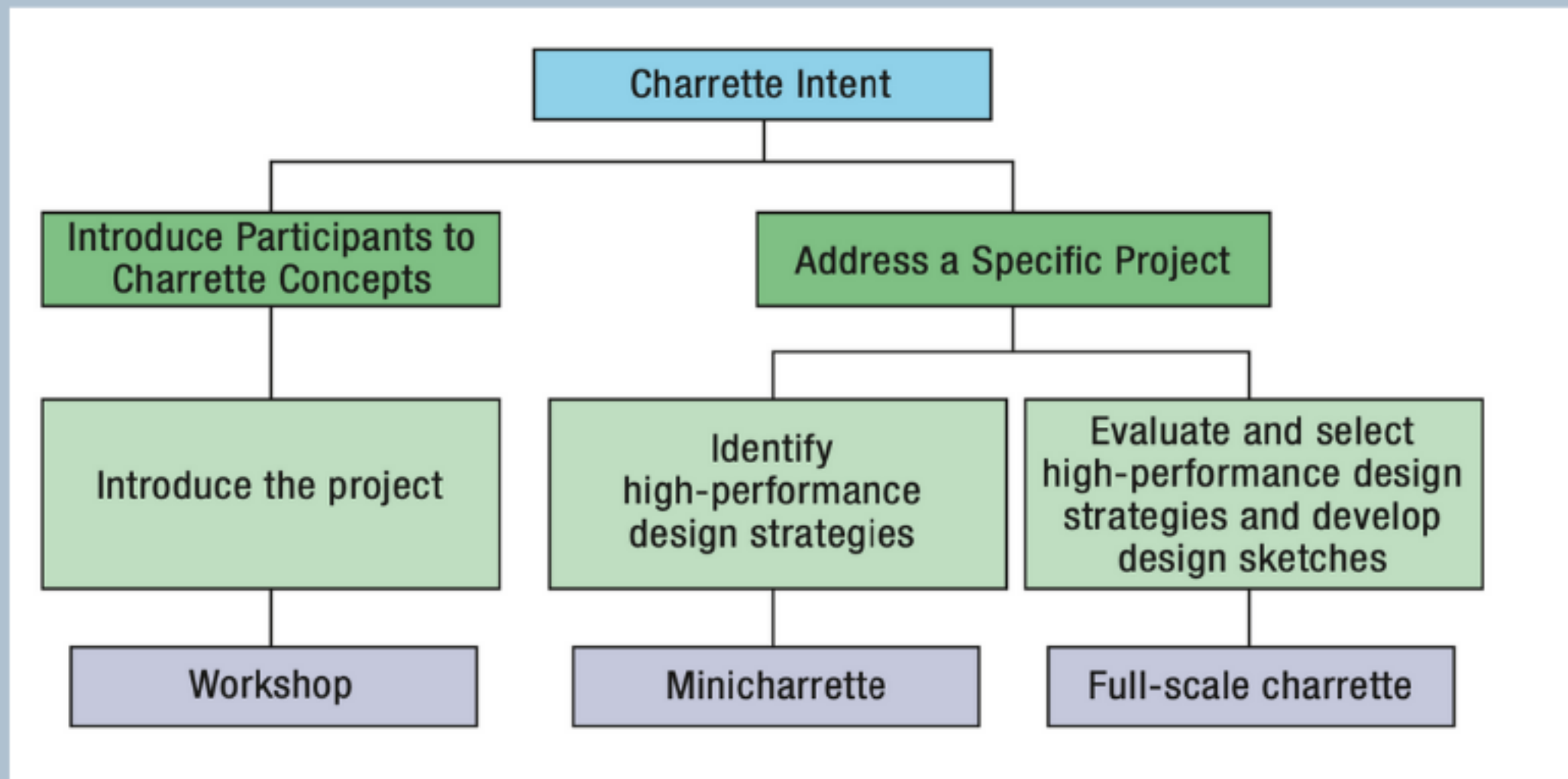


Type and Length

The charrette includes two major elements: an educational component (workshop) and an interactive planning component (collaborative exercises and optional breakout groups).

Refer to Figure 2 and Table 1 to identify the purpose and type of event most appropriate for a particular project.

Flow Chart for Determining Type and Length of Charrette



Event Type	Description	Length	Purpose
Workshop	Large-group presentations and discussions	½ day	• Introduce participants with limited time to high-performance design concepts and strategies. • Introduce participants to the charrette process and engage them in “practice” charrette exercises. • Conduct a low-cost, workshop-only event.
Minicharette	Workshop plus interactive exercises	1 to 1½ days	• Provide basic training in high-performance design topics and present the results of the predesign energy analysis (conduct in workshop format). • Encourage “buy in” acceptance for the project, generate enthusiasm, and develop promotional materials. • Set performance goals for energy, emissions, water, site, materials, waste, IAQ, and O&M. • Identify high-performance design strategies and technologies appropriate for the project (conduct in breakout groups).
Full-scale charrette	Workshop plus intensive breakout group discussions	2 or more days	• Provide basic training in high-performance design topics and present the results of the predesign energy analysis (conduct in workshop format). • Encourage “buy in” acceptance for the project, generate enthusiasm, and develop promotional materials. • Set performance goals for energy, emissions, water, site, materials, waste, IAQ, and O&M. • Identify high-performance design strategies and technologies appropriate for the project (conduct in breakout groups). • Develop design sketches based on the selected strategies and technologies (conduct in breakout groups). • Evaluate and select one or more design sketches to be developed into the project construction plans.



Summary of Charrettes for High-Performance Projects

Hold a Kickoff Meeting

- Purpose
- **Type and length**
- **Resulting products • Agenda**
- **Location**
- **Date**
- **Resources to cover or defray costs**
- **Participants**
- **Motivational and educational speakers**
- **Facilitators to lead the charrette and breakout groups**
- **Partners to supply resources or buy into the charrette process and its results, or both • Project information for participants**
- **Pre-design energy analysis before the charrette**
- **Date, time, and logistics of the next steering committee meeting**



Determine Event Date and Location

After the kickoff meeting, the members of the steering committee must swiftly make the most important decisions. The planning of subsequent events cannot be completed until these essential steps have been taken. Complete the following within two weeks of the kickoff meeting at minimum:

- Confirm the date and location of the event.
- Reach consensus on an initial agenda.
- Identify and contact the most influential facilitators and speakers.
- Coordinate a pre-design energy analysis of the project (if necessary).
- Keep in mind that the composition of the steering committee, the decisions made during the kickoff meeting, and the event's dates and location will have a significant impact on its outcome.

A carefully chosen steering committee and a well-executed kickoff meeting will lay the groundwork for a successful event.





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THANK YOU

