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GREEN BUILDING SPECIALIST
BEYOND SMART CITIES
INTEGRATIVE PROCESS AND ECO-CHARRETTE
FOR GREEN BUILDING PROJECTS
ONLINE PROFESSIONAL COURSES LED BY THE WORLD'S TOP SPECIALISTS
ONLINE TRAINING BY KRISHNAJI PAWAR
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MODULE 07

Conducting the Charrette

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Conducting the Charrette

This presentation offers advice on how to successfully manage a charrette. We've included lessons learned and helpful tips for reaching consensus on concepts and projects.



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LEARNING OBJECTIVES

- **Introduction**
- **The Day Before the Event**
- **The Day of the Event**

Conducting the Charrette

The day before the event . . .

- Visit the facility.
- Check supplies and participant materials.
- Meet with the facilitator and the speakers.

The day of the event . . .

- Verify logistical arrangements.
- Set the stage with the opening session.
- Describe project and charrette expectations.
- Create effective breakout groups.
- Implement successful charrette practices.
- Set performance goals.







Visit the Facility

Visit the facility to check the room setup and confirm all arrangements with facility staff to avoid surprises. Confirm as many of the following as possible (some might not be possible until the morning of the event):

- The signage directing the participants to the appropriate meeting room is placed (which may not be possible until the morning of the event).
- The AV equipment is operating properly, and any special operation
- requirements are clarified.
- All presentations can be opened and projected and are clear, bright, and visible.
- The room is laid out properly for seating, breakout groups, a resource table, refreshments, and registration.
- The planned arrival of refreshments and lunch coincides with scheduled breaks on the agenda.



Check for supplies and Participant materials.

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Make sure they are prepared to handle last-minute logistical requests. For example:

- Locate the nearest photocopy shop
- Locate the nearest office supply store.
- Locate all the materials that were shipped to the meeting and ensure all materials arrived as anticipated.



Meet With Facilitators and Speakers

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Meet with all facilitators and speakers the evening before the event, if possible, to make sure everyone has arrived, has the needed materials, and is prepared for the event. This meeting gives the facilitators and speakers an opportunity to meet one another, which will help the event flow more smoothly. At the meeting:

- Review the agenda and the roles and responsibilities of each facilitator and speaker.
- Give each facilitator and speaker a participant package so they can familiarize themselves with these materials before the event begins.

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The Day of the Event

Describe Project and Charrette Expectations

Clearly state the project description, issues, and goals, and the expectations for the charrette. At a minimum, the event sponsor or project owner should address:

- **Goals** – The results he or she desires from the project and from the charrette.
- **Project description** – A brief overview of the project with photographs and drawings
- as appropriate.
- **Project status** – What decisions have been made already and what work has been performed?
- **Issues or concerns** – Are there any barriers or problems that affect the project?

Review the owner's presentation before the event to ensure it will give enough information for participants to work from, but not so much that they become overwhelmed.

Implement Successful Charrette Practices

- Consistently form breakout groups. Breakout group members bond during initial exercises. Each group quickly learns how to work together and establishes a rhythm for the event.
- Request that groups keep track of items requested, unresolved issues, and obstacles to achieving a goal. The owner receives these documents after the charrette.
- Request that lunch attendees eat before touring all breakout group work. Participants tour each breakout group's approach and results in 3–10 minutes. Each breakout group's work is presented by one member. If possible, breakout groups should tour together. Time and group changes are managed by the facilitator.



Implement Successful Charrette Practices +

- The owner and any local dignitaries who missed the charrette should attend the final report-out session to hear the group reports. These guests often act on some ideas right away.
- Request that each group prepare a maximum number of conclusions summaries for the report-out session. Limit the report to four flip charts, one template page, or two blue boards. 1 This restriction limits the time each group spends reporting conclusions and encourages breakout group members to focus on their most important work. The owners will also receive all of the groups' work.
- Photograph speakers, breakout group discussions, breakout group materials, and final presentations to document everything. Take high-resolution digital photos for a report.



Implement Successful Charrette Practices +

- Highlight the participant evaluation form in their packets during the opening session. Remind participants to fill out evaluation forms and drop them in the "evaluation forms" box near the meeting room exit. Stress feedback.
- After the event, carefully label each group's papers. Large carrying cases (tubes or flat portfolios) help collect, transport, and store material.
- For future reports, funding proposals, and press releases, review and photograph or scan breakout group summaries and brainstorming notes on flip chart pages and drawings.
- Provide breakout groups with supplemental materials to support charrette goals. Post-its (perhaps color-coded for topics), facilitator notes (including "ice breakers" and open-ended questions to ask the group), and wall charts that graphically guide conversations through subject constraints and opportunities, goal setting, and group guidance may be used.



Set Performance Goals

- Often, the most important outcome of the charrette is to arrive at a consensus on performance goals for the building.
- The goals can pertain to all aspects of the building, including energy, emissions (carbon and others), water, site, materials, waste, IAQ, and O&M. Setting performance goals during the charrette is important so all key players have a chance to participate, understand, and buy into the goals.
- Goals for energy performance ought to be based on the predesign energy analysis's indication of baseline performance and the estimates of energy savings made by the expert participants.
- The predesign energy analysis ensures that the performance goals are realistic and helps set expectations for all participants.



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