

Preparation Checklist

Charrette Overview

Planning a charrette requires consideration of the team's goals for the project and the type of charrette that would be most productive for achieving these goals. Below outlines a brief overview of considerations when designing and planning a charrette.

- Determine Type of Charrette:** The type of charrette influences the goals of the day, its outcomes, agenda, activities and facilitation, and who will be participating at the charrette. The type of charrette is most determined by the goals of the project, its phase and schedule. The different charrette types can be defined as:
 - Initial Design: focuses on setting goals and principles and fleshing out possible design solutions that will meet the goals of the project
 - Implementation: focuses on identifying barriers and developing action plans for implementation of identified strategies
 - Stakeholder Engagement: focuses on educating and engaging community and identifying key players that can support the development and implementation of project goals and strategies
- Define Charrette Goal:** Defining the charrette goal can shape the type of charrette, the agenda, break-out groups and overall outcomes. Keep the following in mind when developing the goal:
 - Clear and concise
 - Quantifiable

Sample goals include:

“To explore the goal of a net-zero affordable housing development through an interactive dialogue; to develop a process map template for the ABC project; and to define a “resource kit” of strategies and tactics, integrated with the process map, that could be deployed on the ABC project and similar projects.”

“Identify priority strategies for creating safe and accessible walking, biking, driving, and public transportation options for ABC project residents and develop an implementation plan to overcome the anticipated barriers to each of those strategies.”

“To identify strategies and action items required to design ABC building as 35% better than ASHRAE 90.1-2007.”

- Establish Invitees List:** The following are key stakeholders and recommended participants to consider when brainstorming the invitee list.
 - Project team members
 - Operations Staff
 - Local sustainability leaders
 - Community stakeholders
 - City / state staff
 - Technical experts
 - Affordable housing stakeholders

Charrette Planning

Once the type of charrette, its goal and invitees have been considered, the planning can begin. Below outlines a checklist of action items for key stages in the process to ensure a successful charrette.

Pre-Charrette Planning

- Develop and Assemble Charrette Materials*
 - Agenda, including statement of charrette goal and allotted time for breaks
 - Presentation(s) (to include overview of project details and goals, background information related to charrette goal, research and analysis findings, etc.)
 - Include inserted images of site, such as site plans and/or Google Earth images
 - Handouts, including:
 - Project drawings / plans, maps
 - Exercises
 - Breakout group guide and activities
 - Posters / Flip charts to highlight:
 - Large printouts of general site plans and/or project drawings
 - Guides for breakout groups
 - Charrette goal
 - Rules of engagement
 - Bike Rack (list of issues that are important but off topic to be addressed later)
 - Charrette feedback page
 - Exercises and / or breakout group activities
 - Charrette website (as applicable, to host printed materials and project info)
- Perform Research / Analysis (as applicable)*
 - Site / Climate data
 - Shading study
 - Precedent research
 - Case studies of best-in-class similar projects (goals, strategies, performance metrics – use to set specific numerical goals)
 - Case studies of likely strategies to be employed (e.g. external shading, greywater treatment, etc.)
 - Preliminary (30 minute) energy modeling (develop end use energy breakdown for the baseline)
 - Water balance (volume of water falling on roof / site, anticipated demand of water w/in building)
 - Solar balance (solar energy falling on roof / south façade, anticipated demand of energy w/in building)
 - Financial Incentives
- Communicate Key Information to Invitees and Confirm Logistics*
 - Identify other presenters (from the design team, stakeholder groups, etc.) when developing agenda and presentation materials
 - Send to invitees before charrette (ideally 5 – 7 days before the charrette)
 - Agenda
 - RSVP list
 - Prep material / homework (articles, project docs, background info)
 - Pre-charrette survey (as applicable), including:

Enterprise Communities Charrette Tools

- Name
- Organization and role
- Involvement with project (checklist "none", "some", "very involved", additional notes)
- What do you want to get out of the charrette?
- What ideas, strategies, and barriers do you think need to be addressed?
- Charrette logistics
 - Address, room #
 - Directions and parking
 - Time
- Post charrette event info to project / charrette website (as applicable) (ideally 5 – 7 days before the charrette)
- Contact other presenters to give directions about length of presentation, tone, material to cover, flow, etc. (ideally at least 2-3 weeks before the charrette)
- Assign and Coordinate with Facilitator's Assistant*
 - Schedule a preparation meeting with assistant
 - Discuss roles and responsibilities
 - Review agenda and logistics

Creating the Space

- Determine Charrette Room*
 - Locate space with optimal characteristics for collaboration and presentation: ensure flexibility, tables and chairs can be moved around and relocated; access to internet; wall space for posting flip chart pages; open, ample daylight, easily accessible
 - Find and reserve room (call 1 week before to double check set up of chairs, tables, projector)
 - If possible, visit room day before charrette to check room layout, furniture, presenting options and wall space for flip chart pages
 - Confirm building access, security (do you need anything to get into building, ID?)
 - Coordinate refreshments (order, and confirm space for set up and accommodating group size)
- Plan Charrette Set-up and Gather Materials*
 - At Registration Table:**
 - Sign in sheet (already includes names, organization, email, phone, interest in follow up, email list, future events)
 - Name tags (printed out or blank)
 - Pens
 - Printed agendas
 - Handouts (as applicable)
 - At Tables** (ideally for 6-8 people):
 - Breakout group guides (reference guides, books, resources, etc.)
 - Flip charts
 - Breakout group names (as applicable)
 - 6-8 color markers, 2 regular pens
 - Note pads and post-its

Enterprise Communities Charrette Tools

In Charrette Box:

- 6-8 color pens for each table
- Small note pads for general note taking (2 per table)
- Small post-it notes for charrette feedback and exercises
- 50 per table colored dots (for voting in exercises)
- 3 rolls of painter's tape, 3 rolls scotch tape, 1 roll double sided tape
- Scissors (1 per table)
- Tracing paper roll (12 in. for small drawings and 24in. for large)
- Architectural scales and/or engineering scales (1 per table)
- Flip charts (with sticky back) (1 per table, 2 for overall group)

For Facilitator & Assistant:

- Speaking notes on presentation
- Annotated agenda or other guiding instructions
- Worksheets to be distributed before group exercises
- Note pad and pens or lap top for taking notes and tracking Green Communities Criteria

Wrapping Up

Charrette Deliverables

- A set of project sustainability goals
- A set of strategies to be pursued or investigated
- An overall champion as well as specific champions for each strategy
- A Green Development Plan (based on the Enterprise Green Communities Criteria)
- Enterprise Green Communities Charrette Grant documentation (if applicable)

Closing Remarks

- Immediate next steps
- Review of champions
- Next group meeting date
- Assignment of long terms plan/development of a Sustainability Roadmap
- Thank you—to the participants, the host, and the client

Follow up Items (as applicable)

- Submit AIA Form B (if applicable)
- Upload presentation to project website / ftp site
- Compile and consolidate notes, send to attendees
- Send charrette feedback survey to participants
- Prepare Charrette Report of key findings and results

Additional Tips and Guidance

Stock Questions to Promote Discussion

- How can the identified strategies be prioritized?
- What barriers may there be to strategy implementation?
- Who else do we need involved to succeed in implementing the strategies?
- How do the strategies map to a timeline of the project schedule?