# How to Use the Green Communities Charrette Tool Packet

(with Aging-in-Place Amendment)

Welcome! A packet of materials has been assembled to support and guide you in your role as charrette facilitator for the Enterprise Green Communities program. The documents in the Green Charrette tool packet provide the information and resources that a facilitator needs to understand the format and expectations and ultimately facilitate a successful charrette. Each “tool” should be viewed as a template that can be used “as is” or modified based on the resources and experience of the facilitator.

* **Facilitator’s Guide** – An introduction to the charrette process, containing essential information about implementing and facilitating a Green Communities Integrative Design Charrette.
* **Preparation Checklist** – A checklist describing all of the things the facilitator needs to prepare in advance of and/or bring to the charrette.
* **Sample and Annotated Agendas** – Provides a suggested structure and flow for the charrette, demonstrates how to establish goals, organize topics for the day, structure, timing, etc.
* **Green Communities Checklist / Scorecard** - The Green Communities checklist can either play a central role in the charrette or it can take a back seat to other discussions, depending on the experience of the project team. It is important to note that teams must complete the Checklist during the charrette, or after, as part of their grant reporting.
* **Annotated Checklist / Scorecard** - Serves as a "cheat sheet" of issues for you, the facilitator, regarding common strategies and challenges. Blank scorecards will also be provided for the group to identify roles/responsibilities and annotate comments in the comment field during the charrette.
* **Powerpoint** – A basic introductory Powerpoint presentation provides important background information, defines key issues for the group, offers basic education on integrative design, and is intended for use during the charrette as a means of structuring the day.
* **Guidance for Facilitating the Touchstones Exercise** (and Touchstones Results Example) – This exercise is a valuable tool for gaining team alignment around performance goals and the team’s ownership of the project’s objectives and is included in the above charrette agenda. The companion Touchstones Results Example file illustrates how to engage this exercise, and a “blank” version of this file can be used to implement this exercise during the charrette.
* **Guidance for Facilitating Breakout Group Exercises** (and Breakout Sessions Worksheets) – The small group exercises identified in the charrette agenda are most effective in groups of 5-8 people to allow for everyone to be involved. This Guidance document outlines an approach, by describing the use of three groups, each focused on one of the following: site issues, building issues, operations issues. The companion Breakout Sessions Worksheets are intended for use by these small groups to record their findings.
* **Aging-in-Place Prioritization Matrix**– Exercise designed to aid with prioritizing/weighting Aging-in-Place strategies based on anticipated resident age mix in for the project. Participants place sticky notes with proposed strategies into categories – life safety, convenience, occupant security, and accessibility/ability to use. For example, arm rests aren’t a life safety issue but are more than just a convenience so they might fit into the “accessibility/ability to use” category. Teams can then weight strategies based on the category; life safety would likely rate higher than convenience strategies when prioritizing budget items.
* **Aging-in-Place Existing Conditions Checklist** - A list of criteria based on Aging-in-Place Principals with rating boxes to indicate if measure is met, partially met, or not met for project being audited.