Getting Started

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The goal of the kickoff phase is to **set the team up for success**. In this early stage, project teams should come to consensus on the following:

- Energy and emissions reduction targets
- Desired economic outcomes
- The project workplan, schedule, and key milestones
- Required skills and capacity
- Gaps in expertise and who will be brought onboard to fill them

A critical outcome of this phase is building trust through shared goals and open, honest dialog about the building's current state and what the building owner hopes to achieve through the project. In addition to building consensus and understanding with external consultants and service providers, aligning goals across the building owner's various internal divisions is a necessity. Senior management must set a tone that celebrates opportunities for continued improvement across finance, asset management, operations, and on-site staff.

At the end of this phase the team should have a clear understanding of goals, a well-defined workplan with key milestones, clear roles and the beginning of a trust-based relationship that will support creative problem solving.

Build the Team, Set Goals and Timeline

INPUTS

To set the project up for success, a point-person from the building should be identified. This person will be responsible for setting expectations with the consultant team, communicating with leadership within the real estate organization, and working with the building operations team to support data collection activities.

ACTIVITIES

During the kickoff phase, activities include:

- Identifying the team, including internal resources and external service providers
- Getting educated on the latest energy and carbon trends and requirements
- Conducting a formal kickoff meeting to set goals, define processes, and establish a project timeline
- Establishing a tenant engagement strategy

OUTPUTS

Deliverables from this phase can take many forms, including kickoff meeting presentation slides and notes, a formal workplan, a Gantt chart, or some other means of communicating the key project objectives and milestones. The team is now ready to dive into the deep energy retrofit.

LESSONS LEARNED & KEY CONSIDERATIONS

- **Establish clear objectives** - Outlining a clear set of objectives based on technical and economic needs specific to each building early in the process creates clarity on project workload, the types of expertise that will be needed, and the time required to complete the work
- **Select a team that will collaborate across disciplines -** Building decarbonization is a multifaced and challenging effort. The team should comprise members who are eager to work and collaborate across disciplines.
- **Include the building operations staff** – Understanding the nuances of how the building operates is an important part of the investigation and energy modeling phases of the project. Include the building Chief engineer and key operating personnel in the kickoff meeting and other key milestones.

- **Engage tenants -** Beyond the immediate team, it is important to consider how and when to engage the building tenants. Even with the most efficient equipment, a building will not achieve deep energy and carbon reductions without tenant buy-in and action.
- **Connect with contractors, equipment manufacturers & subject-matter experts:** Secondary support from these groups can often be very helpful because they bring additional expertise and a different perspective from those in the core project team.