Case Study Process

1. Case Study Assignment
2. Do Initial Research
   – Web Research -
3. Contact the Project Owner, Architect & Builder
4. Project Owner(s) Interview & Site Visit
5. Contact the Approving Official, Interview if Necessary
6. Draft the Case Study – All Sections
7. Submit for Review
   – Team Review
   – Supervisor Review
   – Informant Review
   – Principal Investigator Review & Approval
8. Publish!
Step 1: Case Study Assignment

• Buddy System – Teams of 2 Researchers per Topic Area
• Each Person is assigned Primary Researcher on at least one Case Study
• You will be Secondary Researcher on one other Case Study
• You may choose a 3rd Case Study for independent research
# Step 1: Case Study Assignment

Primary Case Study Assignments – Research Teams

<table>
<thead>
<tr>
<th>Researcher Name</th>
<th>Primary Research Assignment</th>
<th>Secondary Research Assignment</th>
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</thead>
<tbody>
<tr>
<td>Your Name Here</td>
<td>Glass Agg. infiltration – Toyota</td>
<td>Load-Bearing Cob House</td>
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<td>Glass Agg. infiltration – Toyota</td>
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<td>Glass Agg. - West Bay Sidewalk</td>
<td>Straw/Clay Insulation - Retrofit</td>
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<td>Shingle Recycling Plant</td>
<td>Quixote Village Zoning / SRO</td>
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<td>Yauger Park LID BioFiltration</td>
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<td>Yauger Park Pervious Pavement</td>
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</table>
Step 1: Case Study Assignment

Additional Scopes of work (Team Responsibility)

• Prospect Case Studies for Oly Topic Areas
  – Glass Aggregate as road base
  – Pervious Pavement on collector / local access street
  – Use of recycled asphalt in pervious pavement
  – Find Advanced LID Code Language / Standards in other jurisdictions
  – Organize Site Visits for Weeks 5, 6 & 7
  – Prospect other case studies
Step 1: Case Study Assignment

Case Study #3 - Self-Assignment

• Review remaining Assignment Sheets
• Choose one additional Case Study to work on
• Make an independent workplan
Step 1: Case Study Assignment

Getting down to Work:

• Review your Case Study Assignment Sheet
• Ask Clarifying Questions
• Save a First Draft of Case Study in Google Drive – your folder in “In Production” subfolder
  – use blank Format Template already in your folder
  – Make a copy, rename to your case study title
  – start filling in all the project data you have
• Meet w/Team Members, make a workplan
Step 1: Case Study Assignment

Get Familiar with Google Docs

• Explore, familiarize yourself with folder structure – see: PTG – Google Docs

• Find your case study in google spreadsheet “Case Studies”

• Notice you can look at other Interns folder contents, and they can see yours
Step 1: Case Study Assignment

Log in to the Google Calendar

• If you will attend “Open Office Hours” edit that event
  – add your name and expected time to be there
  – Note any specific objectives you want to address with Supervisor(s)

• Use this for any appointments you make with team members, supervisors, city staff, etc.

• We want to see your appointments

• Others may be interested in your topic and want to attend your meeting – please welcome them
Step 2: Do Initial Research

3 Focus Areas for Initial Research

• Do internet research on the Specific Innovation of your Case Study

• Complete *Applicable Codes & Standards* assignment

• Set appointment, Review Public Records
Step 2: Do Initial Research

Do internet research on the specific innovation:

- Google Searches
- Identify educational resources, trade associations, technical publications, or innovative code language pertaining to your case study.
- Review any published case studies on the topic in CIDB or other sites – follow links to reference materials
- Bookmark sites so you can easily return later
- Share good “finds” with your team
- Use boolean language to refine your search (advanced search)
- Add citations, links, etc to your Draft Case Study “additional resources” section
- Access academic search engines – find peer reviewed journals – e.g. epsco, etc.
Step 2: Do Initial Research

Applicable Codes & Standards assignment

• Identify 3 applicable code sections or industry standards

• Think... Structural, Energy, Electrical, Fire, Plumbing, Stormwater, etc.
  – Use Public eCodes, other standards on the web
  – Find the document at public/college library
  – Last resort – ask City Staff to see hard copy when you do public records search

• Cut / paste relevant code language into doc in your folder
Step 2: Do Initial Research

Applicable Codes & Standards assignment (cont.)

- Write a brief paragraph about how each applies to the specific innovation(s)
- Try to show the connection between your case and the code requirement.
  - Does the code describe a prescriptive path that your case does not follow?
  - What if any alternative compliance path is identified
- Is the intent of the code clear? And does your case follow that intent?
Step 2: Do Initial Research

Set Appointment, Review Public Records

• Work through Supervisor to coordinate a time with Olympia City Staff to access files

• If jurisdiction other than Olympia, follow PTG – Public Records Search
Step 2: Do Initial Research

Other Tips For Initial Research:

• Interview an expert on the topic
  – ask them to orient you to the innovation and find the applicable codes
• Work together as a team
• Take Good Notes, Bookmark good websites
• Upload good research resources to your case study file
• Assignments due by Week 2:
  – Applicable codes assignment & worksheet
  – 1-2 page summary of what you’ve learned
Step 3: Contact the Project Owner, Architect & Builder

• Meet as a team to define research objectives, prepare interview questions for each contact

• Review Interview Etiquette and Project Owners Script before placing the call
Step 3: Contact the Project Owner, Architect & Builder

Contact Information

• You’ll keep the contact information for your case study in a dedicated spreadsheet on Google docs.

• “2014 Research Contacts – [Name of Case Study]” I will create it in your case study folder

• We will any information we already have in there to start with.

• Your job is to add additional contacts of people related to the case study, and keep up-to-date
Step 3: Contact the Project Owner, Architect & Builder

Make Initial Phone Contact -

• Introduce yourself, the case study and explain your work with NWEBG

• If needed, explain the project purpose and help them understand WHY it’s important.

• Request an in-person interview & site visit within the next 2 weeks, set appointment
Step 4: Project Owner Interview and Site Visit

• Conduct a brief initial interview(s) over the phone - 10-15 minutes.
• Plan a site visit, including a longer interview
• Gather additional documents, take photos, etc.
• Write a 1-2 page *draft* project description & narrative that captures everything you learned. Add it to the Google Doc
Step 4: Project Owners Interview and Site Visit

• Goal is To Learn
  – What was required to get the permit, or what could have been if ...
  – Why the innovation was chosen
  – How it was designed and / or installed
  – What it will cost, return on investment
  – Expected Benefits

• Be as clear and focused as possible.

• Drill for details
Step 4: Project Owners Interview and Site Visit

• Prepare for the interview & site visit by planning date, time, location & transportation plans with your team and project owners’ team.

• Invite and include other members of the project team

• Confirm the meeting by phone or email 1-3 days before
Step 4: Project Owners Interview and Site Visit

Request specific supporting documentation you would like them to bring to the meeting.

- PTG Supporting Documents
Step 4: Project Owners Interview and Site Visit

- The Interview should be conducted on-site where the innovation is (or will be) installed if at all possible; otherwise at their office or another location.

- Gather photos, documents and other supporting information during this meeting.

- Go to the meeting prepared with a camera, thumb drive and note taking supplies.
Step 5: Contact the Approving Official

• Meet as a team to define research objectives, review all project information / info gaps

• Prepare interview questions for each contact

• Review Interview Etiquette and Code Officials Script before placing the call
Step 5: Contact the Approving Official

Make Phone / In-Person Contact:

- Introduce yourself, your class working w/NWEBG
- Briefly explain what you know about the project and permit
- Explain what records you have / need
Step 5: Contact the Approving Official

- Request written description of the “Permitting Process” paragraph – or write it yourself based on interview responses.
- Review the first draft of this section by the due date (Week 4)
Step 6: Draft the Case Study

- Complete and Turn in all Assignments

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Assignment</th>
</tr>
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<tbody>
<tr>
<td>Week 1</td>
<td>Case Study Assignment Worksheet</td>
</tr>
<tr>
<td>Week 2</td>
<td>Basic Project Data in Format Template</td>
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<tr>
<td>Week 2</td>
<td>Applicable Codes and Standards Assignment</td>
</tr>
<tr>
<td>Week 3</td>
<td>1-page summary of Initial / background research</td>
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<tr>
<td>Week 4</td>
<td>Draft “Permitting Process” Section &amp; Table</td>
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<tr>
<td>Week 4</td>
<td>1-2 page project description &amp; Narrative</td>
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<tr>
<td>Week 5</td>
<td>Supporting Documents</td>
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<tr>
<td>Week 5</td>
<td>First Draft Case Study</td>
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<td>Week 6</td>
<td>Second Draft Case Study</td>
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<tr>
<td>Week 7</td>
<td>Final Draft Case Study</td>
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</table>
Step 6: Draft your Case Study

• Assemble these in order and format consistent with **Case Study Format Guide**
Step 6: Draft your Case Study

- Complete the Permitting Process section as early as you can
- Succinctly (1 paragraph) summarizes the code requirements and alternative compliance path which led to successfully permitting the innovation.
- Bulletize these points for the Code/Compliance Path Table – with direct links to supporting documents if available
Step 6: Draft your Case Study

- The Narrative section contains the most detailed information on the Code Innovation, including:
  - Design considerations
  - Performance specifications
  - Proper Installation and Use
  - Cost-Benefit Analysis (Return on Investment)
  - Additional resources (education / reference material)

- It should be used to show a positive value proposition in terms of social, environmental and economic criteria.
Step 6: Draft your Case Study

• Write the Abstract last - It provides a complete overview of the project so should include high points of all sections including at least one sentence on Permitting Process.

• This information becomes the text for summary view listings when a user is browsing or searching case studies on the website.
Step 7: Submit for Review

- **1ST DRAFT:** Review assignments and first draft case study with your “buddy” team member.
- **2ND DRAFT:** Edit and Submit 2nd Draft to your Research Supervisor.
- He/She will review and suggest edits, and check it for conformance with case study format before passing Final Draft to the Principal Investigator (PI).
- **FINAL DRAFT:** After any final edits, it will be returned to you to begin the Informant Review Process.
Step 7: Submit for Review

- FINAL DRAFT must undergo a technical review by those involved in the project to insure the highest quality product.
  - Approving official(s)
  - Project owner(s)
  - Architect / designer
  - General contractor / project manager
  - Subcontractors
  - Product / technology suppliers
Step 7: Submit for Review

- See Informant Review Process – Project Task Guide

- Follow the process there to use Google Docs for Informant Review and Edits
Step 8: Publish!

- Once Informant Review Process is complete, Case Study will be approved by Principal Investigator.

- It will be Published! To the Code Innovations Database at www.CodeInnovations.org.
Step 8: Publish!

- Case Studies will be published with a list of contributors including you, so you can take credit for growing the base of Green Building knowledge!