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

Researcher Name	Primary Research Assignment	Secondary Research Assignment
Your Name Here	Glass Agg. infiltration –Toyota	Load-Bearing Cob House
	Load-Bearing Cob House	Glass Agg. infiltration –Toyota
	Glass Agg. - West Bay Sidewalk	Straw/Clay Insulation - Retrofit
	Straw/Clay Insulation - Retrofit	Glass Agg. - West Bay Sidewalk
	Shingle Recycling Plant	Quixote Village Zoning / SRO
	Quixote Village Zoning / SRO	Yauger Park LID BioFiltration
	Yauger Park LID BioFiltration	Yauger Park Pervious Pavement
	Yauger Park Pervious Pavement	Shingle Recycling Plant

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 jurisidctions
  - 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

Due Date	Assignment
Week 1	Case Study Assignment Worksheet
Week 2	Basic Project Data in Format Template
Week 2	Applicable Codes and Standards Assignment
Week 3	1-page summary of Initial / background research
Week 4	Draft “Permitting Process” Section & Table
Week 4	1-2 page project description & Narrative
Week 5	Supporting Documents
Week 5	First Draft Case Study
Week 6	Second Draft Case Study
Week 7	Final Draft Case Study

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 Analsys (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!