

How to Write a Sustainability Roadmap Case Study

CASE STUDY OBJECTIVES

1. To provide real-life examples of what worked well in implementation of a project and what did not, including comprehensive tools, strategies, and how-to guides consistent with the Roadmap performance improvement measures (PIMs)
2. To use the content structure used to write the PIMs for consistency in presenting these real-life examples. The case study template is a loose checklist of data points (or fields). Users who become familiar with both the PIMs and case studies will know where to find useful data.

CASE STUDY PROCESS

1. Use the case study format to guide the information-gathering process and to help establish an outline.
2. Contact the Roadmap coordinator with any questions and to establish a timeline.
3. Gather information internally that is consistent with applicable template data points. Not every data point has to be addressed.
4. To the extent possible, write in a narrative form.
5. Ask the Roadmap coordinator for input and assistance throughout preparation of the case study.
6. Submit the final draft of your case study to the Roadmap editor for review.
7. Use the editor's comments to finalize your manuscript.
8. The Roadmap the editor will coordinate design and posting on the site.
9. The Roadmap communications team will work with the owner to prepare a press release for the case study.

Notes:

1. Writing a case study is a team effort that includes:
 - a. The initial writer ("owner")
 - b. Contributions from colleagues, designers, vendors, etc.
 - c. A Roadmap coordinator and/or editor
 - d. The Roadmap communications team
2. The process of writing a case study can take a month or more to complete.

CASE STUDY STRUCTURE

Project Title: Write a title that describes your project (e.g., *Recycling Blue Wrap to Reduce Solid Waste*).

About Your Facility

Write a brief description of your facility to establish context for the case study. Include demographic information including the following:

- Name, health care system, location
- Facility type
- Size of facility: #staffed beds, #FTEs, square footage, outpatient visits/year, etc.
- Project completion/case study date

Summary Boxes

Please fill out the data in the boxes that are relevant to your case study topic. Add or delete data points useful to your topic.



Executive Summary Statement

Write one to two sentences or a short paragraph summarizing the project discussed in the case study. For example: *X Hospital instituted a blue-wrap recycling program and reduced its solid waste by X percent, saving X dollars per year.*

- What issues are addressed?
- What was the objective/goal of the project?
- Summary of the solution: What did the facility or organization do to solve/improve the problem?
- What are the benefits? Are there any measurable data on cost/cost savings, environmental benefits, etc?

Benefits

Report the triple-bottom-line benefits of the project.

- Economic - cost/benefit, investment, payback
- Environmental - energy, water, waste, climate, air quality issues
- Social – effects on patients, staff, community, etc.

Guide for Program Replication

Include the following, if applicable:

- List of who's on the team
- Team member roles and responsibilities
- Clear and concise steps on how to duplicate the program
- Sourcing information (supply chain issues, sample contract/RFP language)
- Financing challenges and strategies
- Implementation (planning and launch barriers and strategies for overcoming them)
- Ongoing management considerations
- Commissioning/retrocommissioning strategies
- Links to sample policies, training and educational materials, pictures
- Data collection/tracking and reporting suggestions
- LEED or other program connections
- References (where to go for more information)

Codes, Standards, Regulations

Include regulatory issues that should be considered for such projects.

Challenges, Lessons Learned, and Next Steps

Describe successes, lessons learned, next steps, and ongoing program management issues.

Energy Case Studies

Add this summary data in box:

Applicable PIM:
Climate zone:
Year ENERGY STAR labeled:
Score:
Percentage energy saved:
Energy intensity:
Contract type:
Technologies/tools used:

Waste Case Studies

Add this summary data in box:

Applicable PIM:
Waste type:
Major success:
Technologies/tools used:

Water Case Studies

Add this summary data in box:

Applicable PIM:
Climate zone:
Water and sewers separately metered? (Y/N)
Gallons water saved/time period:
Dollars saved/time period:
Technologies/tools used:



Communications/Testimonials

Include notes about the project from staff, the community, organizational leadership, etc.

Contact Information

Provide contact information for the author in case Roadmap staff have more questions. Also, let us know if you would be willing to answer questions from other facilities on your case study.

FREQUENTLY ASKED QUESTIONS

Q: Do I have to address *all* the data points (or fields)?

A: No, some data points may not be relevant. The list is intended to serve as a checklist to help authors think through the information they have to share. Provide information only for data points relevant to your project.

Q: What is an “applicable PIM”?

A: If there is a performance improvement measure (PIM) already posted on the Roadmap website that relates to the case study, list it here. If you don’t know, write “don’t know”; if there is no relevant PIM, write “none.”

Q: Will I get help?

A: Yes! It takes a team to write a case study (see “Case Study Process” above).

Q: Will I get recognition?

A: Yes! You will be recognized when the case study is released. Often, case studies are picked up by trade journals that might want to write an article on the topic.

If you have further questions, please contact us at www.sustainabilityroadmap.org/contact. Thank you for your time and effort in sharing your story through a case study!

Supply Chain Case Studies

Add this summary data in box:

Applicable PIM:

Strategic ops/product/contracted service:

Other EPP considerations:

EPP contract language:

Sourcing/planning calculators (if applicable):

Sourcing/planning strategies:

Implementation/management barriers and/or strategies:

Other technologies/strategies: