

EiR Case Study Writing Framework

Introduction

This document aims to support the development of case studies for the Turing Way Practitioner's Hub by providing an overview of the case study writing process and a tool for individual Experts in Residence, Turing Way Liaisons, and Technical Writers to implement and document the process in practice. The document is divided in two parts.

Please note, this document aims to serve as a flexible tool that can be tailored to the needs of each case study writing process. It can be adapted as needed, and it is recommended that any edits are documented for further improvement of the framework.

Steps in the journey

Step 1: Kickoff meeting

Kick-off meetings will aim to establish objectives for the case study, define interview participants, and tailor the process framework to the needs and circumstances of individual case studies.

Step 2: Interviews

Interviews with key stakeholders will take place to inform case studies. Interviews will be run by Technical Writers in collaboration with EiRs and Liaisons.

Step 3: Writing

Technical Writers will write a preliminary draft of the case studies. EiRs and Liaisons will use this time to reflect on the process up to this point, and implement any adjustments to next steps as needed.

Step 4: Approval

Technical Writers will share a preliminary draft of the case studies with EiRs, Liaisons and key participants, allowing them to revise and provide feedback, making adjustments as needed.

Step 5: Reflection

EiRs and Liaisons will conduct a preliminary evaluation of the final case study, and a closing workshop facilitating reflection and feedback on the case study writing process.

Case Study Writing Tool

Tailoring, implementation, and documentation

This section of the framework will provide templates for EiRs, Liaisons, and Technical Writers to utilise for defining and documenting the detailed elements of their process. Each template corresponds to a step in the journey, and once filled, will serve to keep track of progress.

Step 1: Kick-off Meeting

Timeframe: 1 week

Preparing for meeting

Reviewing standard roles and responsibilities: In preparation for the Kick-off meeting, EiRs, Liaisons, and Technical Writers are to review the standard roles and responsibilities for each party, found in the Roles and Responsibilities template below. These will be tailored and agreed on during the meeting.

Liaisons are to attend an onboarding meeting with a TWPB Team Member. In this meeting, the case study writing framework will be discussed, roles and responsibilities clarified, as well as details about the case study writing process which may vary from cohort to cohort (i.e., the number of case studies permitted per EiR).

Establishing objectives: In preparation for the Kick-off Meeting, preliminary objectives for the case study are to be drafted:

- Liaisons are to meet with EiRs to discuss their communication objectives for the case study and draft an initial iteration of the objectives using the Case Study Objectives template below. This template is set to support EiRs in articulating an overall objective for the case study, as well as key messages, target audiences, activities, and evaluation methods. It is important to clearly communicate to EiRs that these objectives pertain only to their case studies, not the entirety of the TWPB Programme.
- EiRs are to revise and edit the preliminary objectives ahead of the kickoff meeting, where the objectives will be formalised.

Tailoring process timeline: Ahead of the Kick-off Meeting, LW Liaisons are also to establish a preliminary timeline for the process of developing case studies:

- Liaisons are to tailor the standard process timeline using the Case Study Timeline template below. The tailored template will be revised and formalised during the Kick-off Meeting.

Case Study Objectives			
Impact Statement: What impact do you want to have by developing case study?			
Message	Target Audience	Key Activities	Evaluation Method
What message do you want to get out via this case study?	Who would you like to get this message out to?	How will the message be communicated? Consider: Style, language, diffusion strategy	How will the communication of this message be measured or evaluated?

Case Study Writing Timeline						
<i>*organisati on name*</i>	Week 1 <i>July 17-July 21</i>	Week 2 <i>July 24-July28</i>	Week 3 <i>July 31-August 4</i>	Week 4 <i>August 7-August 11</i>	Week 5 <i>August 14-August 18</i>	Week 6 <i>August 21-August 25</i>
	Kick-off Meeting	Interviews	Interviews	Writing	Approval	Approval
EiR	Defines objectives	Contributes to interviews	Contributes to interviews	Evaluates process through meeting with Liaison	Revises draft, provides feedback	Conducts process reflection
Liaison	Leads meeting, supports in defining objectives, tailors framework	Contributes to interviews	Contributes to interviews	Leads process evaluation meeting, integrates changes to process	Revises draft, provides feedback	Conducts process reflection
Technical Writer	Supports meeting, supports defining objectives	Leads interviews	Leads interviews	Drafts case study	Drafts final case study	Conducts process reflection

Roles and Responsibilities			
Role	Description	Responsibilities	Supports
Expert in Residence (EiR)	<p>Purpose As a champion of reproducible, ethical, and collaborative data science within their organisation, inform the development of industry-specific case studies. These case studies will capture the 'state of best practices' in their team/organisation, highlight examples, integrate perspectives from a few colleagues and surface challenges/barriers you face when promoting and supporting the adoption of best practices.</p> <p>Their role is critical in steering the vision of case studies and ensuring that these address organisation-specific needs.</p>	<p>Meetings</p> <ul style="list-style-type: none"> - a kick off meeting with the Technical Writer and Liaison, chaired by the Research Application Officer (RAO) - They will attend [1-2] interviews conducted by the technical writer - They can attend the [number TBC] interviews of their colleagues conducted by the technical writer - a process reflection meeting with the EiR - a closing workshop within the TW Collaboration Cafe 	<p>Resources:</p> <ul style="list-style-type: none"> - Case Study Writing Framework (this document) <p>Points of contact:</p> <ul style="list-style-type: none"> - Research Project Manager aaaraujo.alvarez@turing.ac.uk - Liaison <p>Team support:</p> <ul style="list-style-type: none"> - Research Project Manager aaaraujo.alvarez@turing.ac.uk - Senior Researcher msharan@turing.ac.uk
The Practitioners Hub Liaison	<p>Purpose Serve as the primary contact from <i>The Turing Way</i> Practitioners Hub team, who works with EiRs and the technical writer directly.</p>	<p>Meetings</p> <ul style="list-style-type: none"> - a meeting for onboarding with the Research Application Officer (RAO) - a kick off meeting for the EiR, Technical 	<p>Resources</p> <ul style="list-style-type: none"> - Case writing Framework (this document) - Timeline for writing (shared for each case study)

	<p>Their role is crucial to facilitate the case study writing process.</p> <p>What is in it for you?</p> <p>Liaisons will have an opportunity to gain insights into the ways of working while building connection with sectors they may be interested in.</p> <p>They will be given co-authorship of the case study.</p> <p>By working with the technical writer and The Turing Way team, they will learn about collaborative, interview-based writing processes, and have an opportunity to review and add their own perspectives into the case study.</p> <p>They will be listed on The Turing Way Practitioners Hub website, and given appropriate credit for their contribution.</p>	<p>Writer and Liaison will be chaired by the RAO</p> <ul style="list-style-type: none"> - They can attend the [number TBC] interviews conducted by the technical writer - a process reflection meeting with the EiR - a closing feedback workshop within the TW Collaboration Cafe <p>Asynchronous support</p> <ul style="list-style-type: none"> - They will keep the momentum for writing process going by sharing updates (via email, slack - templates will be provided), help keep them on timeline and directing people to necessary resources - They will liaise with Technical Writers - They will directly liaise with EiR to ensure they feel supported - They will share feedback with the 	<ul style="list-style-type: none"> - Template for emails will be developed with the team <p>Points of contact:</p> <ul style="list-style-type: none"> - Research Project Manager aaraujo.alvarez@turing.ac.uk - Senior Researcher msharan@turing.ac.uk
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		project team to help improve the process	
Technical Writer	<p>Purpose Produce case studies of approximately 800 words covering key messages and topics of open source practices within EiR's organisations, informed by interviews with key stakeholders.</p> <p>This role is critical in producing the practical outputs of the case study writing process.</p>	<ul style="list-style-type: none"> - a meeting for onboarding with the Research Application Officer (RAO) - a kick off meeting for the EiR, Technical Writer and Liaison will be chaired by the RAO - [number TBC] interviews, conducted by the technical writer <p>Asynchronous support</p> <ul style="list-style-type: none"> - one round of case study review and edits 	<p>Resources</p> <ul style="list-style-type: none"> - Case writing Framework (this document) - Timeline for writing (shared for each case study) <p>Points of contact:</p> <ul style="list-style-type: none"> - RAO (crincon@turing.ac.uk) - TW Project Manager aaraujo.alvarez@turing.ac.uk - Senior Researcher msharan@turing.ac.uk

Conducting meeting

The Kick-off Meeting, chaired by the Liaison, will aim to formalise objectives for the case study, define interviewees, and tailor the process framework to the needs and circumstances of individual case studies. The following topics are to be covered during this meeting.

Agenda Item	Notes
<ul style="list-style-type: none"> ● Revising and agreeing on objectives, timeline, and roles/ responsibilities. - EiRs, Liaisons, and Technical Writers are to revise the preliminary objectives, timelines, and roles and responsibilities detailed above, ensuring that these are reflective of the needs of this case study process. - Note: when revising the process timeline, seek to identify and account for risks that may prolong the timeline of this specific case study. 	
<ul style="list-style-type: none"> ● Defining interview participants, approach, and recruitment. - Identifying Participants: Based on the Case Study Objectives, EiRs are to advise on what stakeholders would be suitable participants (interviewees) for the case study. Participants are documented in the Interview Participants template below. 	

<ul style="list-style-type: none"> - Note: It is important that diverse representation is considered when selecting interviewees. 	
<ul style="list-style-type: none"> • Defining interview approach - Interviews will be semi-structured, with some questions being prepared ahead of time, and allowing for new questions to emerge during the interview. - Interviews can be conducted as a group (roundtable format) or individually. Appropriate methods are to be defined by EiRs, Technical Writers and Liaisons. - EiRs and Liaisons may be involved directly in conducting interviews or may contribute to preparing interview questions. The involvement approach for each is to be defined. Some considerations in defining involvement include: <ul style="list-style-type: none"> - Are there areas where EiRs or Liaisons may be best placed to ask questions/ are there areas of expertise that would be beneficial to include in interviews? If so, it is highly recommended that relevant EiRs and Liaisons are present during the interviews. - Decisions around interview format can be documented in the Interview Format template below. 	<p>Individual or group?</p> <p>EiR contribution?</p> <p>Liaison contribution?</p>
<ul style="list-style-type: none"> • Defining recruitment approach 	

<ul style="list-style-type: none"> - Liaisons and EiRs may reach out directly to interviewees. It will be important to establish a key point of contact and consider whether EiRs or Liaisons may have a greater chance of engagement. - Note: If EiRs reach out to interviewees directly, it will be important that Liaisons are included in communications to facilitate their scheduling of interviews - When reaching out to interviewees, consider including the following in the recruitment message: <ul style="list-style-type: none"> - The objectives of the interview - That whilst interviews will be recorded, interviewees will have a chance to view, adjust, and approve articles before it is published. - That prepared interview questions can be shared ahead 	
<p>Discuss next steps</p> <ul style="list-style-type: none"> - Agree on next steps regarding recruiting participants, scheduling interviews and preparing interview questions. <ul style="list-style-type: none"> - If there are pending items on the agenda or further work to be done prior to interviews, consider scheduling a follow up call to finish this step. - Determine communications plan (how you will contact 	

each other i.e., Slack or email).	
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Interview Participants			
Name	Role	Contact Information	Status (contacted, interviewed, pending)

Step 2: Interviews

Timeframe: 2 weeks

Scheduling interviews

Liaisons will be responsible for scheduling interviews.

Drafting Interview Questions

Technical Writers will draft interview questions with the aid of EiRs and TW as detailed in the Interview Approach template. Interview questions can be documented within the Interview Notes Template Below, which can be copied and tailored to each interview.

Interview 1 Notes	
<i>*Insert participant name here*</i>	
Prepared Questions	
Question	Answer
Question 1:	
Question 2:	
Miscellaneous Notes	

Interview 2 Notes	
<i>*Insert participant name here*</i>	
Prepared Questions	
Question	Answer
Question 1:	
Question 2:	
Miscellaneous Notes	

Interview 3 Notes	
<i>*Insert participant name here*</i>	
Prepared Questions	
Question	Answer
Question 1:	
Question 2:	
Miscellaneous Notes	

Interview 4 Notes	
<i>*Insert participant name here*</i>	
Prepared Questions	
Question	Answer
Question 1:	
Question 2:	
Miscellaneous Notes	

Step 3: Writing

Timeframe: 1 week

Case Study Writing

Technical Writers will be responsible for writing a draft of the Case Study based on the established objectives and conducted interviews.

Process Reflection Meeting

EiRs and Liaisons are to meet during the writing phase to reflect on and evaluate the process thus far. This meeting is an opportunity for EiRs to provide feedback and request adjustments to next steps as needed. Meeting notes detailing feedback, requested adjustments to the process, and next steps should be taken on a separate document and shared with the TW Team.

Step 4: Approval

Case Study Feedback

Technical Writers are to share a draft of the Case Study with EiRs, Liaisons, and interviewees. Each will have an opportunity to provide feedback and request adjustments to the draft.

- EiRs and Liaisons may use the established objectives to evaluate the case study and provide feedback with a view to best achieving these objectives.

Step 6: Reflection

Case study evaluation

EiRs and Liaisons are asked to provide a preliminary evaluation of the finalised case study draft, drawing on the Established Objectives. This evaluation will be re-assessed as part of a final evaluation of the Turing Way Practitioners Hub, enabling more time to assess the impact of each case study.

Closing Workshop

EiRs and Liaisons are to attend a cohort-based workshop where the case study writing process will be evaluated. This workshop will allow EiRs and Liaisons with an opportunity to share insights they have gained through this process, and provide feedback that informs case study writing processes for future TWPH cohorts.

Case Study Evaluation (EiRs)		
<i>*Insert EIR/Liaison name here*</i>		
Objective	Results	Notes
Objective 1		
Objective 2		
Miscellaneous Notes		

Recommendations for Future Iterations

- Liaison onboarding:
 - Future iterations of the TWPB would greatly benefit from a more comprehensive Liaison onboarding process. Based on the feedback shared by Liaisons, the following items are recommended for consideration in future onboarding processes:
 - A prepared narrative or 'intro pack' for Liaisons, where the objective and scope of the case study writing process and outcomes, as well as details that pertain to that specific cohort are explained. This may include the number of case studies that EiRs can draft (i.e., the number of case studies EiRs can draft).
 - The objective of the case study as a communication tool is a particularly important consideration to flesh out. It is recommended that the TWPB team elaborates on the tangible ways in which a case study can offer benefits to each partner organisation, as well as how it can directly benefit the Turing Way.
 - Ensuring that the onboarding meeting covers not only the case study writing process, but also items such as communications:
 - Between liaisons and the TWPB team (i.e., the weekly catch up, which has proven highly beneficial for the initial iteration of the programme).
 - Between Liaisons and EiRs: Ensuring continual communication with EiRs is beneficial to the process as it promotes accountability and engagement. It is recommended that:
 - The TWPB team drafts a narrative or 'info pack' for EiRs explaining the project and their role within it.
 - Liaisons are given options for communicating with EiRs that they can tailor to their own needs. This could include sending a weekly update email detailing where they are in the writing process and communicating pending tasks and deadlines, creating and maintaining a Slack channel, or having weekly meetings with their EiRs.
 - Between Liaisons/EiRs/ Science writers and interview participants. It is recommended that the TWPB team drafts a narrative or 'info pack' for interview participants explaining the project and

their role within it. Gantt Chart or similar project management tool per case study could be useful.

- EIR accountability
 - Feedback shared by Liaisons highlighted the challenge of having EIRs working on the framework outside of meetings. Depending on further feedback throughout the programme, a possible improvement to the process would be designing for multiple meetings (instead of a single kick-off meeting) in preparation for interviews, thereby ensuring that all action items are done within the meetings.
- Step 6: Evaluation
 - It will be important for Step 6 of the process, which consists of case study evaluations and a group evaluation of the framework is designed in a way that ties into the greater evaluation of the programme.
- Framework design:
 - Based on the feedback received from Liaisons, it is evident that the Case Study Writing Framework would benefit from redesign with a view to improving user experience. Considerations for a redesign include:
 - Evaluating other possible formats for the framework (i.e, Google slides, Miro Boards).
 - Separating step by step instructions (which have been highlighted as very helpful) from the documentation elements of the framework (i.e., Case Study Objectives Template).
 - Considering content design and interactivity (i.e., considering how to share content in smaller chunks and embedding clickable links that support a user journey).
- Flexibility:
 - It is important to emphasise that the framework is a flexible tool that can be tailored to each case study. This can be reiterated throughout the narrative of the framework, and can also be accounted for as a consideration in its redesign.

