

Draft Case Studies Schedule

Completion Date	Activity
5/15	Coordinating Committee case study workgroup meeting (discuss selection criteria)
5/23	Action Item (selection criteria) for Coordinating Committee
5/24-7/6	Case study partners complete selection criteria questionnaire
7/9 and 7/16 week of	Coordinating Committee case study workgroup meeting to review completed selection criteria questionnaires and form recommendation for Coordinating Committee approval of case study partners
7/24	Action Item (case study partners and approval for consultant selection process) for Coordinating Committee July Meeting
July and August	Complete Plan Source Process
7/25	Send scope to PlanSource partners (consultants)
8/3	Response deadline for PlanSource partners (consultants)
8/6	Send examples of work from Consultants to selected case study partners
8/15	Partner rankings due
8/20	First Choice Consultant Case Study Interviews
8/21-8/24	If needed subsequent Consultant Case Study Interviews
8/31	Board Item due
9/18	Targeted date for H-GAC Board approval (of contracts
October	Case studies kick-off
April 2013	Case studies complete

Goals, Objectives, and Metrics Development Process

A draft schedule for completion (and discussion) of the Goals, Objectives, and Metrics:

- „Metrics Matrix“ with Goals and Metrics distributed to Coordinating Committee Tuesday, Feb. 28th
- Coordinating Committee comments on only the matrix organization due by Tuesday, March 6th
- Release to Workgroups for their completion on Thursday, March 8th
- “Metrics Matrix Office Hours” for workgroups held week of March 12th in order to answer questions about the matrix and the path forward (in person and phone).
- Final due date April 2nd, for first round of Metrics completion from workgroups and Coordinating Committee.
- Joint workgroup meeting (“Goals and Metrics Symposium”) to be held on April 13th to discuss goals, objectives, and metrics
- Week of April 16th and April 23rd – transcribe all notes from workgroup event
- Week of April 30th – clean up notes (highlight duplicates, etc.)
- Week of May 7th – send out goals/objectives/metrics to Coordinating Committee and workgroups
- Week of May 7th and May 14th – compare objectives metrics to „best practices“ (highlight gaps) – Workforce report card, Foresight panel, Policy Link Social Equity, others nationally and from our region.
- May 10th: Coordinating Committee working group meets to review new goals wording and review objectives
- Week of May 14th – data availability review on metrics (spatial, non-spatial, source, etc.)
- Week of May 21st – document objectives and metrics evolution for workgroups, Coordinating Committee review at May 23rd meeting
- Week of May 28th – prepare for goals, objectives, metrics open house event
- May 30th - CC final comments on objectives due
- June 12th – hold goals, objectives, metrics open house event for workgroups (final comment)
- June Coordinating Committee – approve goals, objectives, and metrics for use in planning process (subject to revision)

Case Study Partner Selection Criteria

A. Project Impact and Merit (Up to 25 points for this section total)

- What is the proposed study area location and boundaries? Please list the transect(s) (urban, suburban, coastal, rural) that the case study is located in. (Submitters are required to list at least one transect.)
- What element(s) of the RPSD will the case study focus on? (Please provide a draft scope of work for the case study) Elements include transportation, housing, healthy communities, economic development, and the environment.
- What is the demonstrated need in the study area and why would this be timely for that area?
- What are the anticipated study outcomes and how many people will benefit from this study's outcomes?
- What will be the long term benefit (direct or indirect) of the study to the study area and to the 13-county region?
- Does the proposed case study build upon previous planning work? If so please provide a list of the plans, including links to the plans (if available) and describe how the case study will expand on the previous effort and not duplicate that effort.

B. Fulfilling Sustainability Goals (Up to 25 points)

- How does the focus of your proposed case study relate to the 15 Goals of the RPSD? Please list the goals that the case study will help advance implementation of and provide a short narrative describing how the case study is consistent with the goals. (Case study must demonstrate relationship to at least one goal each in People, Places, and Prosperity. If YES, 5 points, If NO, zero points) (Up to 6 additional points possible for how well the case study will advance the intent of the goals)
- HUD livability principles? (All or nothing for each HUD livability principle, 1 point each, 6 points total)
- How will the case study add to the level of knowledge/bring something unique to the region in terms of advancing sustainability? Please describe how the case study results/recommendations will be replicable in other entities in the region.(Up to 8 points)

C. Ability to Implement (Up to 25 points)

- How will the case study act as a catalyst for implementation, including what type of implementation is desired (for example construction, policy change or other kind of implementation)? (Up to 15 points)
- What is your ability to move the case study toward implementation (adoption of study, apply for grants, etc.)? What partners and resources have been obtained or are needed for implementation? (Up to 10 points)

D. Partner Entity Information (Up to 25 points)

- Will you be able to meet the timeline for being a case study partner? (Timeline will be attached: Evaluation commitment, providing match on time, etc.) (If NO, zero points) (If YES, 5 points)
- What resources can you bring to the case study (data/in-kind services or cash match, etc)? (If NONE, zero points) (If YES up to 15 points)
- Are you leveraging any existing partnerships and/or can you demonstrate collaboration with stakeholders/partners in the study area? (If YES up to 5 points)

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