



Appendix G: Case study protocol

Case Study Protocol		 University of Portsmouth	 School of Environmental Design and Management
Name of case study:			
Task description or activity			Completed ✓
Phase 1: Initial contact			
1.1	Telephone call <ul style="list-style-type: none"> • Speak to manager or owner. • Confirm that venture has been selected for further investigation of sustainability. • Inform of aim and objectives of study. • Inform of data needs. • Confirm availability of manager/owner, staff, community and visitors for interviews and questionnaires. • Schedule date of visit. 		
1.2	Send letter of intent.		
1.3	Make telephone call day before departure confirming my arrival and accommodation.		
Phase 2: Preparation before departure			
2.1	Copies of data collection instruments (interviews and questionnaires) <ul style="list-style-type: none"> • Visitor questionnaires (15) • Manager/owner interview (2) with data needs list • Staff interviews (15) • Community interviews (10) 		
2.2	Equipment		
	<ul style="list-style-type: none"> • Camera <ul style="list-style-type: none"> ○ empty memory card ○ charge battery ○ battery charger 		
	<ul style="list-style-type: none"> • Backup camera <ul style="list-style-type: none"> ○ empty memory card 		
	<ul style="list-style-type: none"> • Tape recorder 1 		
	<ul style="list-style-type: none"> • Tape recorder 2 		
	<ul style="list-style-type: none"> • Empty tapes 		
	<ul style="list-style-type: none"> • Batteries, AA & AAA 		
	<ul style="list-style-type: none"> • Clipboards (12) 		
	<ul style="list-style-type: none"> • Stationery <ul style="list-style-type: none"> ○ pencils (15), ○ pencil sharpener ○ erasers ○ extra A4 paper ○ divider file 		
	<ul style="list-style-type: none"> • Water sample bottles(2) 		
	<ul style="list-style-type: none"> • Bacteria test 		
<ul style="list-style-type: none"> • pH, EC and TDS water monitor <ul style="list-style-type: none"> ○ backup ○ calibrate both 			
<ul style="list-style-type: none"> • Empty flash disk 			

	<ul style="list-style-type: none"> • Computer CDs 	
	<ul style="list-style-type: none"> • GPS (empty memory) + calibration (WGS84) 	
	<ul style="list-style-type: none"> • Backup GPS (empty memory) + calibration (WGS84) 	
	Pilot survey only: <ul style="list-style-type: none"> • Computer • Printer • Paper and extra printer cartridge 	
Phase 3: Field work –data collection		
3.1	Arrive, register and take up accommodation.	
3.2	Meet with manager/owner to inform him that you have arrived.	
	<ul style="list-style-type: none"> • Obtain permission to proceed with data collection. 	
	<ul style="list-style-type: none"> • Request manager to inform staff of your presence and co-operation. 	
	<ul style="list-style-type: none"> • Schedule meeting with manager for interview. 	
	<ul style="list-style-type: none"> • Request a venue for conducting interviews with staff that does not disturb functioning of operations or visitors. 	
	<ul style="list-style-type: none"> • Request list of staff from various levels and job functions that can speak English or Afrikaans. 	
	<ul style="list-style-type: none"> • Find out when the best time will be to request visitors to fill in questionnaires before leaving facility. 	
	<ul style="list-style-type: none"> • Request introductions to community members. 	
	<ul style="list-style-type: none"> • Arrange transportation, directions or a game guard or community liaison officer if needed. (May introduce to community members.) 	
	<ul style="list-style-type: none"> • Request short guided tour of facilities. (Familiarise with locality.) 	
3.3	Set up appointments with community members (when and where convenient).	
3.4	Start data collection.	
	<ul style="list-style-type: none"> • Collect GPS points and routes. 	
	<ul style="list-style-type: none"> • Take photographs. 	
	<ul style="list-style-type: none"> • Conduct staff interviews (10) [permission to record!]. 	
	<ul style="list-style-type: none"> • Conduct community interviews (5) [permission to record!]. 	
	<ul style="list-style-type: none"> • Request visitors to complete questionnaires (10). 	
	<ul style="list-style-type: none"> • Manager/owner interview [permission to record!]. 	
	<ul style="list-style-type: none"> • Get secondary data, visitor statistics, financial, water, electricity, etc. 	
	<ul style="list-style-type: none"> • Collect water sample for chemical analysis. 	
	<ul style="list-style-type: none"> • Test physical characteristics of water, pH, EC and TDS. 	
	<ul style="list-style-type: none"> • Collect water bacterial sample. 	
3.5	Take part in activities; make observations and notes.	
3.6	Collect any other secondary data available.	
Phase 4: Departure		
4.1	Check that you have all data that was promised. All equipment All interviews and questionnaires All tapes Other documents promised	
4.2	Thank the manager/owner, staff, community and visitors where possible for their participation and contribution.	