



LEARNING BRIEF

HOW TO DOCUMENT PROJECT CASE STUDIES

>>Defining the case study

Defined variously as an intensive, in-depth, empirical study, a case study focuses on analyzing or investigating a key project intervention, approach with the goal of learning from it. Case studies provide detailed information that can inform project implementers about the successful elements and the potential pitfalls and challenges. Case studies unlike success stories are developed to be neutral and therefore may showcase 'failure' or 'successes'. However, most non-profits tend to develop case studies to showcase interventions that are perceived to be successful.

Preparing to document your first case study

1. Develop and discuss the key case study statement with the project implementers. The case study statement defines the parameters for investigation allowing the researcher to focus on a specific set of interventions and a stated outcome.
Ensure to define the audience of the case study as this will both shape the interventions to investigate, the language and the outline.
2. Conduct a thorough desk review of all the project material including the project proposal, mid-term and annual reports and any other supplementary information like documented stories. Take summary notes of your personal interpretation of what the project set out to do and any other comments or questions you may want to explore.
3. Develop an outline for your case study. It may be something like this:
 - Key findings (Informed by evaluation reports or other project reports, project staff interviews)
 - Intervention (Informed by Project proposals/quarterly reports, project staff interviews)
 - Methodology (Informed by Project proposals/quarterly reports)
 - Impact (Informed by Success stories from field documentation, project staff, beneficiaries, stakeholders interviews, implementing partners)
 - Lessons learned (Informed by Project staff, implementing partners, stakeholders)

The outline should identify the key interviewees to ensure sufficient qualitative and quantitative data has been collected to triangulate the results.

4. Prepare for field-based documentation which is the most critical aspect of the case study documentation process. The key activities here include:
 - Develop your interview tool which is a questionnaire that will document the answers to your questions outline
 - Discuss your case study statement and key questions with field-based staff; these people often have key information that can guide the documentation process, clarify key interventions, highlight modifications, and explain actual implementation processes. The goal is to probe and understand the case study statement thoroughly before embarking on the documentation.
 - Go to the field with an open mind; sometimes you may not find a specific beneficiary that you were looking for, instead focus on another interviewee who can speak on their behalf.
 - Start by asking very general questions, for example, the interviewee may speak about their project experiences and key observations. This is a crucial step to allow more critical information to be given than just specific answers to your questions. Often, researchers will find that they have richer information when they allow the interviewee to speak freely rather than rushing to tick off all the questions.
 - Begin to develop different angles for your case study after every interview. Write draft notes every evening and highlight any key questions you should probe in subsequent interviews.

5. Develop the case study
 - Review the case study statement again and compare it with your notes; look for themes and angles.
 - If there is no template for your case study, simply write along the outline you developed to ensure your case study flows logically.
 - Have the field staff review your draft case study for refining of assumptions, verifying evidence and assessing the validity of conclusions.

>>What does a good case study look like?

1. Illustrates the key elements of the case study statement effectively using quantitative or qualitative data and anecdotes
2. Provides key lessons and recommendations and new information that can guide other implementers

Where to find more resources:

Impact and Innovations Development Centre www.iidcug.org