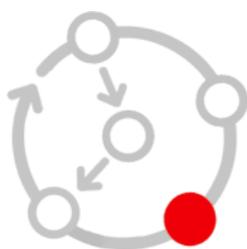


Evaluation Support Guide 3.2

Writing Case Studies



Evaluation can help you to work out what difference you are making through your services or activities. **Evaluation Support Guide 1.1** helps you to clarify your aims, outcomes and activities and **Support Guide 2.1** helps you to use indicators to measure your progress.

This guide shows how case studies can help to bring your work alive. They can help funders to see that their funding is having a positive effect. They can also show potential service users how your project could benefit them. However, it is not always easy to write a good case study! This guide offers some ideas.

When writing a case study, you need to:

- Clarify the purpose and message
- Organise the content, your ideas and your time
- Draft (and get feedback)
- Edit

Purpose and message

Before you start to write, you need to be clear about **who** you are writing for and **what** you want to say. A case study written for volunteer training may not convince an external stakeholder to fund you. You may be able to use the same basic information, but you will need to edit it and present it differently. Here are some questions to help you think about your purpose and message:

Key question	Common answers	Note
Who is it for? Who is the audience?	<ul style="list-style-type: none"> • Service users • Potential service users • Supporters • Funders • Other staff or volunteers • Partners • Policy makers 	Your audience influences the way you write and the information you include. You may be able to make some assumptions about what they know. If you have several audiences see page 5.
What is the purpose?	<ul style="list-style-type: none"> • Awareness • Information • Decision • Action 	Your case study may fulfil one or more of these purposes
What is the message?	<ul style="list-style-type: none"> • Showcase success • Explain challenges • Illustrate learning 	Your message should be focused. Don't mix messages in a case study.
What is the focus?	<ul style="list-style-type: none"> • Outcomes and impact • Activities • Processes • Environment: eg social, political 	You can use visuals in case studies, see page 3, or present your case study in different formats see page 5

Organising content, ideas and time

You may already have the subject of your case study, for example, a service user who has made great progress, or a service that was unexpectedly challenging. In these cases, the questions in the previous table may help you to organise your thoughts. Otherwise, you will need to review your work, speak to colleagues or service-users to decide what to use.

In all cases, you need to gather and review the available information. Does it reflect your message? What else could be relevant? You can add quotes and images, see page 3.

“Quotes can be taken out of the main body of text to highlight things that might otherwise get lost”

You need to think about how to structure your case study. This can help to make sure you have all the information you need before you start to write. Here are a few elements you may want to include in a case study:

- Context or situation – explain the setting or background
- Baseline – in relation to outcomes you need to be clear on the state at the starting point
- Activities – what was done
- Results – hard information on achievement or progress
- Complications – aspects, issues or factors that limit and challenge
- Analysis – interpretation and explanation
- Stakeholder perspective – the views of service-users, partners or other staff
- Learning – summarising the learning for you or others

You can use the elements in different combinations to suit your audience, purpose, message and focus. Here are a few examples:

Audience – Funder
Purpose - Decision
Focus - Outcome
Message - Success

- Context/Baseline
- Activities
- Analysis of progress
- Stakeholder perspective
- Learning

Audience – Peer
Purpose - Awareness
Focus - Process
Message - Learning

- Situation
- Complication
- Question
- Answer
- Learning

Audience – Stakeholder
Purpose - Action
Focus - Activity
Message -Challenges

- Context/situation
- Activities
- Results/outputs
- Success factors and challenges
- Stakeholder perspective
- Recommendation/Learning

Audience –policy -maker
Purpose - Information
Focus - Environment
Message - Gaps

- Situation
- Complication
- Limiting factors and challenges
- Analysis of options
- Stakeholder perspective
- Recommendations/Learning

Plan the **time** you need to complete the process. You need to draft, get it checked by colleagues, edit, get agreement from anyone quoted and do a final proof read.

Drafting

You should now be ready to start writing. Here are a few tips:

- Keep your writing as clear as possible.
- Try to avoid jargon – see box
- Active tenses are easier to understand than passive tenses. For example: "John pays his bills on time" instead of "The bills are paid on time by John".
- Keep sentences short and sharp. Use 15 – 20 words maximum per sentence.
- Avoid long paragraphs. Stick to one point per paragraph or a word limit of approx 100.

Why do you use jargon?

- Are you being lazy?
- Is it because you can't explain it clearly?
- Are you hiding behind it?
- Is there no other way to say it?
- Is it to sound like you are in the know?
- Are you pretending to speak someone else's language?

You can read more about Plain English in the guide "How to Write Reports in Plain English" on the Plain English Campaign website at www.plainenglish.co.uk.

How long should a case study be? For a snapshot, 100 - 150 words will be enough. If you want to explore an issue a bit more, this can go up to 300 – 350 words. You may need a longer case study, for example, if you are presenting to a seminar.

You can add quotes, figures, graphs or images to strengthen your message or to make the case study more attractive to the reader. These need to be relevant. The table below outlines a few advantages and disadvantages of their use.

Feature	Advantage	Disadvantage
Quotes <i>'It was great fun!'</i>	These can bring colour and depth to your case study. They bring other voices to the narrative.	You may need to ask permission to use them or gather them specifically.
Facts, figures and graphs <i>70% of our service users got a job.</i>	Hard facts can increase the credibility of your message. Graphs and charts can make it easy to grasp the point.	They can be misleading and open to interpretation. Too many may swamp the reader, so the context and meaning get lost.
Images	Can strengthen specific messages. Can make it more interesting, colourful and memorable.	You need to choose images carefully, to match the message and focus. They may need captions.

Always leave time between drafting and editing, so you can review your writing with a fresh eye. Always ask someone else to proofread your writing. You cannot see your own errors!

Editing

If you edit them well, your case studies will be focussed and readable.

When you edit, you need to take out repetition and make sure that you use the best words. You may also need to add in more explanation, if some aspects of the case study aren't clear. Feedback from other people can help you to identify where things are less clear.

Read your case study and ask yourself the following questions:

- Does the main message come across?
- Do you need more evidence to support statements or arguments?
- Is it in an appropriate style for the audience?
- Will it hit a chord with the audience?
- Is it fit for purpose?
- Could it be simpler?
- Is it attractive?

Watch out for...

- Overly long sentences.
- unnecessary jargon.
- spelling mistakes.

Remember, it helps if it looks easy to read, as well as being easy to read!

What next?

You may need to include case studies in a report. You can find out more about how to write a report in **Support Guide3.2 Report Writing**.

If you need advice about evaluation, or would like a copy of this guide in large print, Braille or audio, please contact Evaluation Support Scotland on info@evaluationsupportscotland.org.uk or 0131 243 2770. For other Evaluation Support guides please check out our website: www.evaluationsupportscotland.org.uk.

Appendix: Frequently asked questions

Can I ask another member of staff to write the case study?

You might ask someone else to write a case study for you, if they have better access to the facts or to save time. You need to outline clearly the purpose of the case study you want them to write. You may need to set a structure to follow. Make it clear that you have the final say on editing. Always check back with the author, in case your editing affects the meaning or accuracy.

Should I correct the poor English of service-users?

Direct quotes should stand as they are. If you ask a service-user to write a case study, you need to clarify how it will be used and to resolve issues of confidentiality. If you need to edit the text, involve the service user in any revisions. Alternatively you can interview the service user, write up the interview as a case study and then ask whether they're happy with it.

I've got more than one audience, who should I write for?

If you have more than one audience, you cannot assume you know what they all know already. Develop your case studies to suit the purpose and message you most want to communicate. Keep the language simple and avoid jargon. You may find that you need different documents for different audiences.

Should case studies of individuals be anonymous?

Case studies should be anonymous, unless you have the person's permission to use their name. If the person is named, you need to check they are OK with what has been said. They also need to know how you will use the case study and its possible lifespan. For example, someone may be happy now with a case study in a report but could be embarrassed to come across it years later on a training course. You should adapt anonymous case studies so that the person cannot be identified from the details.

What about presenting case studies in different formats?

You can present case studies in different formats, for example:

- a youth group put together a cartoon strip to narrate their personal growth,
- prisoners make art installations to chart their journeys of skill development,
- a picture diary shows how a community transformed a brown-field site into a community garden.

You may want to choose an alternative format to make your information more accessible and relevant to the audience. When developing case studies in alternative formats you still need to think about purpose and message.