

# Tell Your Story: A Guide to Writing Case Studies

Case studies help us to better understand, document, and describe our outcomes and results—both positive and negative. For each case study, we hope to gain an understanding of a key policy or program change and the advocacy efforts that led to the change. Target audiences for your case study may range from the non-technical (such as government officials or policymakers) to the technical (such as family planning advocates in other settings). Balancing the needs of both readers—for a compelling human interest narrative and for simple yet robust explanations of your methods and results—will strengthen your case study.

## Process of Constructing Case Studies<sup>2</sup>

“Case studies can tell a full and rich story about what an advocacy strategy did and accomplished.”<sup>1</sup>

### STEP 1: GATHER THE RAW DATA

To have a comprehensive and in-depth understanding of an event, it is important to gather the fundamental information about the event from multiple sources.

Data collection for a case study may include the following:

- Telling the story through your own eyes, based on your perspective or experience
- Conducting interviews with lead actors to collect quotes and impressions

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1 Coffman, J. (2009). Overview of Current Advocacy Evaluation Practice. Washington, DC: Center for Evaluation Innovation (p. 12).

2 Patton, M. Q. (2002). Qualitative Research & Evaluation Methods: 3rd Edition. Thousand Oaks: Sage Publications, Inc.; and Monash University Library. (2007). QuickRef 27. How to write the case study. Victoria, Australia: Monash University Library.

- Making observations
- Reviewing documents
  - » Media clippings, program reports, meeting minutes, policy documents
- Compiling contextual information
- Capturing moments with photographs

## **STEP 2: COMPILE A RECORD**

Once you have gathered all the information you need for your case study, create a case record. The case record is an edited, organized, and manageable file of all the information you collected on your case.

## **STEP 3: DRAFT A NARRATIVE**

Using the information collected, write a case description following the outline provided here. When determining what to include in the case study, consider what you achieved and what you learned, and then look for common themes, patterns, and phrases that emerge from the various pieces of evidence. The most effective case study focuses on one aspect of the strategy and distills its lessons from the outset. Identify the most compelling quotes and photographs that illustrate the human interest of your narrative. Aim for no more than four to five pages in length.

## **STEP 4: SELF-EDIT AND REVIEW THE DRAFT**

Self-editing allows you to test the story against the original vision and view the product as a reader might. Read the case study as if you were unfamiliar with the topic and ask yourself, “Does this make sense? Could I explain it to someone else?” If it is not obvious what a paragraph is trying to say, rewrite it or delete it. Have individuals who were involved in the advocacy efforts review the case study narrative for accuracy and validity.

# Case Study Outline

**Title:** Try to be as outcome-oriented as possible in devising a title (e.g., Global Fund Commits \$8.7 Million to Improve Access to Family Planning in Uganda). Think of it as a “headline” for your accomplishment. Make it catchy; it should grab the reader’s attention.

## I. The Results

This section briefly summarizes what was accomplished:

- a. Describe the programmatic or policy change that occurred or that you were working to achieve.
  - i. What are the implications for women, healthcare providers, communities, or the nation?
  - ii. What is the potential impact on reproductive health outcomes and other development indicators (e.g., achievement of Millennium Development Goal 5)?

## II. Background

This section describes where you started. As briefly as possible:

- a. Describe the problem or issue.
  - i. What was the problem?
  - ii. Why was it important?
- b. Give a description of the context.
  - i. What is the political climate?
  - ii. What are the relevant indicators/statistics (e.g., contraceptive prevalence rate, unmet need, HIV prevalence, etc.)?
  - iii. What was the existing advocacy, if any, on the issue? Why did you become involved with advocacy for this particular problem/issue?

### III. The Strategy

This section provides detail on how you achieved your results and is a guide to others who want to replicate or modify your strategy:

- a. Explain various aspects of your strategy and the planning process.
  - i. What were your goals and objectives?
  - ii. Which partners or specific actors were involved?
  - iii. What approaches did you use?
  - iv. What difficulties did you face? How did you overcome them?
  - v. What key activities helped you achieve success?
  - vi. What sources of assistance/support did you find most helpful?

### IV. Lessons Learned and Next Steps

- a. What worked? What did not? Include advice for others.
- b. What steps are being taken to ensure that achievements are sustained over time?
- c. What are the follow-up activities? What is the next advocacy target related to this effort (success or setback)?

### V. Acknowledgments

- a. Provide recognition of funders and partners.
- b. Include contact details for one person whom readers should contact for more information.

## Basic Case Study Checklist

- Does the headline summarize your outcome in action-oriented terms?
- Does the first paragraph clearly state your results?
- Are technical terms and jargon defined or rephrased for the lay reader?
- Do photographs and quotes add to—rather than detract from—your key messages?
- Are partners acknowledged?
- Is the document electronic-friendly?
- Is contact information included to provide more information?

### TRANSLATING FAMILY PLANNING JARGON

AVOID OR DEFINE		USE
Contraceptive prevalence rate	→	Percentage of people (usually stated as women of reproductive age, married women, or couples) using contraceptives
Fertility rate	→	Average family size or number of children per woman
Unmet need for family planning	→	Estimate of women who would like to prevent or delay pregnancy but are not using contraception