3.3 REVIEWING AND REVISING

Writing partnership case studies

USE IT
To research, write and share partnership case studies that are fit for purpose

WHEN
Reviewing and revising, or as the partnership moves on

WHO
Whoever commissions the case study, the researcher or writer, and the partners

Case studies capture what a partnership has learnt and share it with people who can use it. These seven tools take you from deciding why you want a case study to getting it read.

1. Process checklist

Not every task applies every time, and they are not necessarily in order. Note who leads each: C, the commissioner (a partner, broker, manager or donor); R, the researcher or writer; or someone else, such as a partner authorised to sign off.

Task	C	R	Other
1. Clarify the purpose and audience before deciding to go ahead			
2. Consider objectives, audiences and uses, a first dissemination plan, and how you will judge effectiveness			
3. Identify any specific issue that could focus the case study			
4. Build engagement from all the key players before starting			
5. Confirm budget, resources, availability of key players and timetable			
6. List the characteristics, qualifications and experience the researcher or team needs			
7. Find a researcher, considering whether they are internal or external, and one person or a team			
8. Appoint them, brief them and introduce them to the key players			
9. Give access to documents and contextual information			
10. Design and agree the research method, and explain it to the key players			
11. Seek everyone's endorsement, and adapt the design as needed			

Task	C	R	Other
12. Collect data from secondary and primary sources			
13. Confirm the data and adjust in the light of new information			
14. Organise the data into a suitable structure			
15. Write a draft, showing how it might be adapted for different uses			
16. Let all key players review the draft and suggest changes			
17. Revise, and have the final version signed off			
18. Disseminate within and beyond the partnership			
19. Evaluate the case study against its objectives			
20. Discuss other uses and produce further products as agreed			

2. Objectives and audiences

Tick which objectives matter for which audiences, so the case study is fit for purpose.

Audience	Review	Report	Learn	Inspire	Promote, fundraise	Institutional memory	Illustrate value	Convince, counter spin
Internal								
Beneficiaries								
Employees								
Partner organisations								
Stakeholders								
External								
Academia								
Donors								
Financial institutions								
Media								
Policy makers								
Potential partners								
Pressure groups								
Sceptics								

Audience	Review	Report	Learn	Inspire	Promote, fundraise	Institutional memory	Illustrate value	Convince, counter spin
Others								

3. Self-assessment for the writer

Before starting, take time to assess what you bring, where you need help, and what assumptions might shape your work. This builds rigour and a more reflective approach.

Knowledge and experience

- How familiar are you with partnering, in theory, strategy and operations, and from which perspectives (partner, broker, donor, beneficiary)?
- What qualifications and experience do you bring for secondary and primary research, record keeping and analysis, and dissemination? Where are the gaps?
- What are your own views on partnering, and how far do they help or hinder?

Questioning your assumptions

- What do you feel about the work, and what do you expect?
- Which aspects will you find most difficult?
- Where might you be intolerant or biased? Can you suspend judgement?

Building reflective practice

- Regular time to pause and take stock
- A journal for ideas, frustrations and open questions
- A critical friend outside the situation
- Others whose skills complement yours
- Regular reviews with a small internal group

Core skills: 1 low, 5 high

	1	2	3	4	5
Action research	☐	☐	☐	☐	☐
Active listening	☐	☐	☐	☐	☐
Dissemination	☐	☐	☐	☐	☐
Document analysis	☐	☐	☐	☐	☐
Illustration	☐	☐	☐	☐	☐
Observation	☐	☐	☐	☐	☐
Persistence	☐	☐	☐	☐	☐
Record keeping	☐	☐	☐	☐	☐
Research design	☐	☐	☐	☐	☐
Synthesis	☐	☐	☐	☐	☐
Writing	☐	☐	☐	☐	☐

4. Building the brief

The brief sets out the writer's roles and responsibilities and the ground rules between writer, commissioner and the partnership. Agree it together, and have both sign it.

Purpose

Why commission it, and for whom? What is its significance to the partnership, the commissioner and the wider partnering community, and how will that encourage participation?

Principles and guidelines

The writer's responsibilities to the commissioner, the people researched and themselves, and any guidelines they must follow.

Methodology

Who defines it? How will it capture history, context, process, outputs and outcomes; be participative; validate information; and protect privacy, confidentiality and, where needed, anonymity?

Procedures

Who makes final decisions, what needs sign-off and by whom, and who coordinates?

Resources

Funding and timescale, plus other support such as access to information, expertise, translation and editing.

Disclosure and copyright

Who sees the findings? Who decides what is withheld or disguised? Who holds copyright? Must field notes and transcripts be handed over?

Caveats

What is binding on each party, and what are they not liable for?

5. Collecting data

Method	Purpose	Advantages	Disadvantages
Questionnaires, surveys, checklists	Quick, non-threatening collection of comparable, often quantitative, data	Anonymous, cheap, easy to compare, reach many people	Little detail, wording can bias, impersonal, low response rates
Interviews	A fuller understanding of people's experience; structured for quantitative, semi- or unstructured for qualitative research	Range and depth, flexible	Time-consuming, hard to compare, interviewer can bias, costly face to face
Document review	How the partnership operates: agreements, minutes, web content, films	Comprehensive and historical, not disruptive, already exists, less room for bias	Slow, may be incomplete or out of date, inflexible; know what you are looking for
Observation	Accurate information on how the partnership works, by taking part or watching	See things as they happen, adapt as events unfold	Hard to interpret and categorise, the observer affects behaviour, hard to stay impartial, costly
Focus groups and workshops	Explore a range of views in depth through discussion	Shared impressions, breadth and depth quickly	Hard to analyse, needs a good facilitator, hard to schedule

Method	Purpose	Advantages	Disadvantages
Reviews	Partners reflect on value and progress, and agree revisions	Hears all partners, deep analysis, can catalyse improvement	Time-consuming, best once the partnership is established; an external reviewer can be destructive

Context

- Census and statistics
- Films and photographs
- Newspapers
- Policy documents

The partnership: secondary sources

- Legal materials
- Minutes
- Memoranda of understanding and partnering agreements
- Reviews and other case studies
- Web content

The partnership: primary sources

- Beneficiaries
- Partners and partner staff
- The partnership broker
- Other practitioners
- Policy makers
- Stakeholders such as communities and suppliers

6. Adapting the case study

Purpose	Adapt it as	Could involve
Influence policy	Advocacy materials: flyers, articles, posters	Imaginative dissemination; opportunities to "sell" externally
Raise public awareness	Media releases for newspapers, magazines and websites	Working with communications teams and journalists
Support and mentor practitioners	Learning partnerships set up for learning	Tasks, a timetable and ground rules
Show the benefits and challenges	Direct experience: site visits, managed dialogues	Facilitated learning events
Convey a partnering issue vividly	Storytelling: a first-hand account	A narrative thread and instructions
Build understanding across cultures and sectors	Role plays acting out a challenge	Briefs for each role and the facilitator
Build decision-making skills	Stop-start scenarios: the story in episodes, predicting what happens next	A teaching note and options
Practise handling challenges	Games with different consequences for each choice	Instructions, rules and levels

7. Getting it read

1. Identify the target audiences (tool 2 above).
2. Decide what impact you want on each.
3. Choose the kind of case study they will respond to (tool 6) in a suitable length, style and presentation.

4. Take account of the time and resources available.
5. Select dissemination options.

Option	Consider
Conferences and events	Can reach and influence a wide audience if the theme fits; tailored events can add site visits, stories and workshops.
Direct contact	Meetings, workshops, training, site visits and presentations bring the case to life through personal enthusiasm, and invite questions.
Online groups	Interactive, topical and responsive.
Media	Needed to reach the general public. "Good news" is hard to place; build links with specialist journalists.
Publications	Well designed and illustrated, they give lasting value. Balance accessibility against depth.
Academic journals	Bring seriousness and respectability, but a small, selective readership.
Third parties	Independent people who know the partnership can endorse it and become its champions.
Websites	Accessible and easy to update, but case studies can get lost, and some audiences won't look.

Adapted from The Case Study Toolbook (Tools 1–7). © The Partnering Initiative. More tools at thepartneringinitiative.org/resources/type/tool/