

CB ASSESSMENT CHECKLISTS



CHECKLIST #3:

Conducting an effective Case Study

Step 1: Determine the purpose

- Determine the purpose of the case studies
For example, are the case studies intended to **highlight the most common example** of how the capacity building was helpful? Or are they intended to **document participants** that have received the most benefit?

Step 2: Identify participants

- Identify appropriate participants
Use the intended capacity building assessment purpose, other data such as a survey and your staff's input to **identify case study participants**

Step 3: Develop interview questions

- Develop questions
Develop the list of questions, aka **interview protocol**, for case study interviews

Step 4: Conduct interview

- Conduct interviews
Be sure the person facilitating the interview has a good grasp of the information your agency is interested in and is able to **keep the conversation organic and flowing**.

Step 5: Review and analyze

- Review and analyze participant material
Analyze the interview data and **review any materials** that are available about the capacity building that the participants received. Analyze the interview data.

Step 6: Write up the case study

- Write a narrative based on information
Write a narrative story based on the interview(s) and other available information. Include quotes and specific examples shared in the interview(s). An example case study narrative structure could be
 - description of the participant,
 - what capacity building they received, and
 - how the capacity building has impacted them.