

How to write a case study

A case study is an in-depth report on a single person, a small group or a process.

Sometimes case studies are derided as not as important, or as less scientific than research tools which measure and quantify things. But did you know, for example, that the link between mothers taking thalidomide and malformation in babies was triggered because of a single case report? Case studies are a very useful form of research and evidence.

It's important that you do them correctly though. Case studies aren't a story. You can't just sit down and tell what happened to someone, going from event to event in the order in which things happened, like you might tell a story to a friend. Case studies have a structure, and a discipline.

Here's a step by step guide on how to write one.

Be clear about why you are writing a case study

Are you writing this case study for funders? For your website? For the Annual Report? Knowing the audience will help you shape the case study. Case studies can be communication tools. You can use them to tell your stakeholders (clients, Board, other services) about the nature of the problems faced by people who use your services, the way those problems are tackled through your service and what outcomes this work can have for people.

Choose who or what will be the subject of your case study

The next step is to choose which 'case' you will study. Your decision will be guided by why you are writing the case study.

Do you choose a typical client? Or a client whose story is unusual but important because it has resulted in interesting or new approaches? Do you want to focus on a client about whom you have lots of information because that means you have lots of rich details? Do you want to create a case study using information from a number of different sources?

These are all valid approaches but they will give you different results.

Think about the ethics of the situation – informed consent

You **MUST** have signed formal consent from the clients involved if you are going to use identifiable information such as names, address, photographs, specific dates other than years (for example, the dates they used your service or the dates of other significant life events). See [How to meet ethical standards when you gather outcomes information](#) and [How to get informed consent](#).

If no identifiable information is used it is still recommended that as a respectful practice, you get client permission for their story to be the subject of a case study if possible.

Collect your case study information

You might gather your information from:

- an interview with the person you are writing about
- interviews with other people with an interest in that person (a carer, a worker)
- assessments, case notes or material the client has produced.

It's important to try and verify your observations with information from a variety of sources. Aim to get at least two separate sources of information to support your conclusions.

What information do you include and what do you leave out? To decide, think about what story the case study tells.

When you have finished these steps, you have done what researchers call 'analysing the data' (information) and 'identifying the significant themes' (stories).

Structure your information

Here is a suggested structure for your case study.

Brief introduction	Set the scene. Introduce the person who is the subject of the case study, which program or service they were involved with and the presenting issue (the reason they contacted, or were referred to, your service).
The person	<p>Describe the client you are writing about, their general background and history. You would include a name, age, relationship or family status, occupation. It is common to give someone a different name (a pseudonym) to ensure additional confidentiality.</p> <p>Ensure you manage the confidentiality issues. Tasmania is a small place – too much information can make someone readily identifiable.</p>
The issue	<p>Describe the problem or issue which is the reason the person is using your service and then explain the impact the problem has had on their life. You might include details of the person's history with the problem and any other attempts they have made to get support to deal with it. This information should be given in chronological order.</p> <p>Hint: While the description of the presenting problem might be quite recent, telling someone's history takes you back in time.</p> <p>You can help the reader understand the sequence of events by doing three things:</p> <ol style="list-style-type: none">1. After you have initially explained the problem that brought the client to your service), tell the history in the order in which it happened, starting with most distant past events.2. Use grammar, especially tenses carefully. See, for example, Susan <i>is</i> experiencing anxiety...she <i>was</i> ringing the children's school...3. Use specific dates where you can.
The response	Describe the services provided, or the approach that was used. You should also explain the short-term and long-term goals your service and the client were working towards.
The outcome	Describe the outcome of the work and the longer-term outlook for this person. Describe how this outcomes data was gathered (eg, interview, focus group, survey data, observation by staff members). You may wish to acknowledge the role played by other services, or other influences on the client's life which also supported them to achieve these outcomes at this point in the case study. It is important to take credit where it is due but not to 'over claim'.
Conclusion	A very brief conclusion should sum up the information about the client, what the issue was and the result of the response your service provided.

Here is a [Example of a Case Study](#).

Some writing tips

While case studies read more like stories than other types of research, they aren't a place for creative writing. They are professional documents. Here are some writing tips recommended by researchers.

Tense: Case studies are usually written in the past tense, after the client has finished their engagement with a service.

Writing style: As much as possible this should be professional although a 'warm' tone is acceptable.

Be factual: Write the facts and be logical about what you are concluding. Don't make assumptions about people's behaviour or thinking. Only write what you know to be fact and don't exclude facts because they seem unpalatable.

Be thorough: Include as much information as you can. Use data from other sources if you have it to support the conclusions you are drawing.

Naming: Don't refer to the subject of the case study as 'the client'. The convention for case studies is to use a pseudonym (unless the client gives permission for their actual name to be used).

Be accountable: If possible, have the person you have written about review the case study and your conclusions and give you feedback.

Referenced links

- [How to meet ethical standards when you gather outcomes information](#)
- [How to get informed consent to gather information from clients](#)
- [A case study example](#)