



# **Improving our Learning from Practice**

## An Emerging Case Study Framework for Partnership Brokers

## Table of contents

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Section 1:

**Introduction:** An evolving approach

Section 2:

**Making the case for learning case studies**

Section 3:

**Positioning learning case studies**

Section 4:

**The role of partnership brokers in developing learning case studies**

Section 5:

**Challenging current donor priorities**

Section 6:

**Capturing 'messiness'**

**Useful references**

# Introduction: An evolving approach

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In recent years the Partnership Brokers Association (PBA) has been commissioned to write a number of case studies on collaborative programmes of work in different contextual settings.<sup>1</sup> These requests have mostly come from entities where key individuals within an organisation have completed our partnership broker training and are actively engaged in brokering activities. This focus on partnership brokering has enabled us to work with an approach that positions research as participative enquiry. The Terms of Reference for our case studies have, to a large degree, been co-created with those commissioning them. The final product thus evolves through a process of dialogue and exchange of sometimes quite divergent views. In this sense, as well as the product itself, the process of developing the case study is one that 'brokers' by incorporating and challenging diverse perspectives.

We have tried to be consistent in positioning our case study approach as a form of story capture in which we draw upon both personal and organisational perspectives. Although what we have produced to date appears to resonate with a wide audience, we tend to write for partnership brokers as partnership brokers. In other words, we are clear that we are offering a specific lens and interpretation of what we find. This approach provides a defined character that seems to be popular with those with whom we work. However, we recognise that it may also raise a number of questions about validity, objectivity, neutrality and 'academic' legitimacy. We address these concerns by being as explicit as possible about the rationale for our case study approach and abiding by a set of core principles that we have evolved over time (see Table 1).

Our case study principles have a philosophical underpinning that draws upon Socratic dialogue.<sup>2</sup> The premise is that case study writing is an iterative process that requires the involvement of a diverse range of players. To ensure that the richness of the information from these sources is fully accessed and interpreted usefully, our case study research actively engages with different academic disciplines and professional backgrounds. Our core principles rest upon the following beliefs:

- The most valuable learning comes from astute questioning and open dialogue
- We must constantly strive to 'speak truth to power' (however audacious that claim may sound)

- We work from the premise that "we don't know what we don't know".

The case study methodology used by PBA has evolved over time and weaves together many strands of knowledge. A key departure point was the involvement of several of our PBA colleagues in the production of *The Case Study Toolbook: Partnership Case Studies as Tools for Change*.<sup>3</sup> The process of developing this book as a community of practitioners was seen as seminal by those involved and we have been delighted to build further on that work. Some key findings from *The Case Study Toolbook* that we have subsequently refined include:

- Acknowledgement of case study writers as people with points of view and perspectives that consciously and explicitly influence the research approach and/or outputs.
- Acceptance of the fact that there is no such thing as 'objectivity' or 'neutrality' and case studies cannot and should not be 'written by robots'. PBA has been explicit about this prior to signing contracts and it has become a selling point for our work.
- Our commitment to undertaking case studies because they are interesting and valuable as learning vehicles for PBA. This involves working quite hard to ensure that case studies are not 'sanitised' by our clients who are invited to see themselves as contributing to PBA's own journey of discovery and to deepening knowledge about partnership brokering.
- A collaborative methodology whereby case studies are produced by a team, typically with one person collecting data and another creating structure, synthesis and flow.

As our case study work has developed, we have been faced with a number of issues and challenges that we believe require careful consideration. These include:

- Further exploration around why partnership learning case studies are important.
- Distinguishing learning case studies from more conventional evaluations and reviews.
- Addressing contradictions /challenges in partnering (e.g. the donor:partner interface).
- Writing case studies as internal/external brokers or as insider / outsiders.
- Dealing with complexity and diversity (including diverse expectations).

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<sup>1</sup> For a list of PBA case studies, see: [partnershipbrokers.org/w/category/learning/](http://partnershipbrokers.org/w/category/learning/)

<sup>2</sup> Socratic dialogue is a literary form in which characters discuss moral and philosophical problems using a series of questions that help a person or group to determine their underlying beliefs and the extent of their knowledge. It is a negative method of hypotheses elimination in that better hypotheses are found by identifying and eliminating those which lead to contradictions. See: [encyclopedia.worldvillage.com/s/b/Socratic\\_method](http://encyclopedia.worldvillage.com/s/b/Socratic_method) and Keatman, T. *Different Researcher Perspectives: A Socratic Dialogue*, Paper for TPI Case Study Project, London, 2006.

<sup>3</sup> A project that took place from 2005-6 with twelve case study writers from different backgrounds and countries. The project was led by The Partnering Initiative in collaboration with the Alcan Prize for Sustainability and SEED (Supporting Entrepreneurs for Environment and Development). See: [thepartneringinitiative.org/research-and-learning/case-study-project/](http://thepartneringinitiative.org/research-and-learning/case-study-project/)

- Ensuring participatory processes for data collection and case study reviews.

The intention of our emerging case study framework is to articulate our thoughts and provide guidance on how to produce learning case studies that contribute to partnering effectiveness and transformational impacts.

# 1. Making the case for learning case studies

*“With a social intervention as complex as collaboration, it is important to know more than whether it works if the evidence is to be of practical use.”*

**Walid El-Ansari et al. (2001)**

## What are learning case studies?

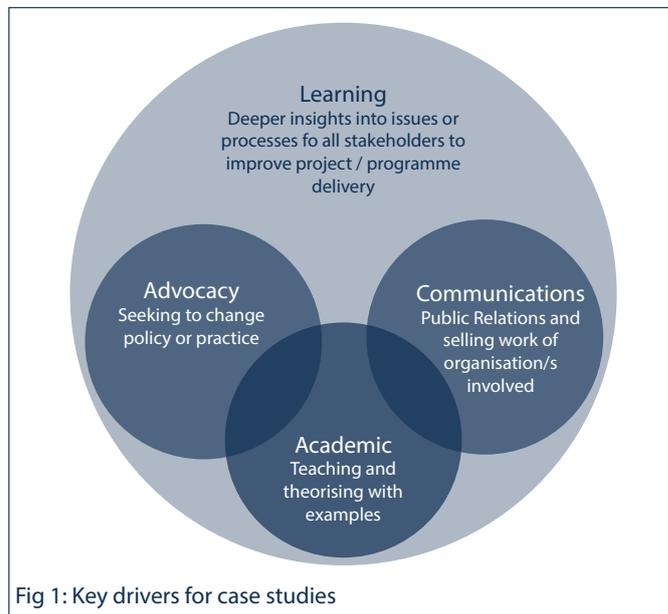
Case studies seek to explain or describe phenomena within a real life context. With an emphasis on answering ‘how?’ or ‘why?’ questions, they can assist in making sense of what has happened as well as to explore situations as they unfold. One of the key benefits of case studies is that the lessons derived from them can be used to make changes and improvements in partnering practice. Our focus is thus on case studies as important tools for learning and promoting change, hence our preference for the term “learning case studies”.

Learning case studies are ideal for exploring the multiple assumptions, approaches and perspectives that partnerships involve. As well as using methodologies such as interviews, documents, observation and focus groups, they can expand our views of what constitutes valid data by drawing on imagery, anecdote, stories, encounters, allegories and metaphor (among others). Learning case studies also promote an ‘interactive’ rather than a ‘detached’ form of research which is well-suited to brokering.

## The drivers for learning case studies

As interest in the partnership paradigm continues to grow, the information derived from learning case studies can provide much-needed information for academics, practitioners, planners and policy makers so that both its reach and capacity are improved. Learning case studies can provide us with a solid evidence base for partnerships (in terms of both results and impact), enable us to improve partnering practice (process) by reflecting on what works and what does not, and explore the role of the partnership broker in these areas.

While the ultimate motivation for developing partnership learning case studies is to understand in order to improve practice, those commissioning them are likely to have particular incentives for undertaking this type of work. These incentives may often be unclear or overlapping (see Figure 1). It is the role of the case study researcher to tease out this information as accurately as possible in order to make the study fit for purpose.



## Core principles for learning case studies

We believe it is important that our approach to case studies is made explicit so we can truly 'raise the game'. This involves pushing boundaries on how partnerships are understood, how they operate and how they can improve. To extract useful information and learn from it, a co-creative approach to understanding partnerships and the role of individuals in those partnerships is crucial. This requires something of a balancing act that draws on partnership brokering skills and expertise, and adherence to a set of core principles when developing the case study.

Learning Case Study Principles	
<b>Promoting learning</b>	Distinguishing a case study from an evaluation, review or story by capturing different perspectives, nuances and contradictions in order to extract lessons that promote change
<b>Crossing the divide</b>	Incorporating the best of both 'academic' and 'practitioner' viewpoints
<b>Showing not telling</b>	Making the partnership narrative come alive by capturing rather than recounting a story. This involves drawing upon multiple perspectives so that Chekhov's quote (which is often used to illustrate the difference between showing and telling in writing) <i>"Don't tell me the moon is shining; show me the glint of light on broken glass"</i> becomes, <i>"Don't tell me the moon is shining; show me the <b>different glints</b> of light on broken glass."</i>
<b>Looking for moments of change</b>	Looking for 'transformational moments' and exploring how these 'moments in time' link together and become catalysts for change
<b>Personalising rather than depersonalising</b>	Celebrating and reporting the role and contribution of individuals
<b>Accepting our limitations</b>	Being open about our own mental models and biases

**Table 1: Core principles for learning case studies**

## The challenges of producing learning case studies

Producing case studies is not without its challenges. Table 2 outlines some of the key difficulties we have encountered in case study compilation and the questions that these have raised for us.

Challenge	Questions
<b>Finding the right entry point</b>	When should the work begin? At the beginning, during or end of a partnership? How do we decide about this timing? Who decides? On what basis? With what purpose? And in whose interest?
<b>Getting <i>real</i> stories</b>	How do we get away from 'success' / 'failure' stories? How do we change our language to avoid a culture of 'exposing failure'? How can we ensure that we are finding examples of what works and what does not? How do we differentiate between reviews, case studies, evaluations and stories?
<b>Communicating clearly and well</b>	What goes public? Can we write open and closed sections for different purposes? What is "lost in translation"? How do we deal with transparency issues? To what extent can you describe what you see?
<b>Reviewing and reflecting</b>	How do we validate wide participation in case study review processes? How do we ensure that several iterations are made? How do we give due diligence to all involved? How can we be accurate but not over-dilute? How do we ensure a 'reflection lens'? What time issues do we face, e.g. donor constraints, reflection time, etc.?
<b>Using the learning</b>	How do we close the loop on the learning process and see whether / how lessons from case studies are being applied? How do we use the case study process itself as a tool for change?
<b>Working with donors / commissioning entities</b>	Who owns the case study? Is there a notion of 'joint ownership'? How do we deal with changing donor priorities, e.g. changing direction mid-stream or when demands change explicitly or implicitly? Do clients really know what they want? Are there hidden agendas? How can we surface them? How do we 'sell' the mechanism of case studies to donors? How do we convince donors to pay for case studies? Is the primary goal to get more case studies commissioned or to get donors to think in a different way about partnerships?
<b>The researcher / writer</b>	What are the most important resources for partnership case study writers? How do we deal with politics e.g. resentment, power imbalances, political correctness, etc.? How do we deal with personal ethical dilemmas/issues?

**Table 2: Challenges and questions for case study researchers / writers**

## 2. Positioning learning case studies

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*“Case studies are multi-perspectival analyses. This means that the researcher considers not just the voice and perspective of the actors, but also of the relevant groups of actors and the interaction between them.”*

**Winston Tellis (1997)**

We believe that clarity around the way we use the term “case study” is important. Many of those with whom we work describe our case studies as “stories”, while others see them as forms of review that can be used as benchmarks against which to assess growth and development.

Table 3 attempts to identify what evaluations, reviews, case studies and stories may involve and where there may be overlaps between them. In this regard, we note that our learning case studies can usefully combine different components of evaluations, reviews and stories. Depending upon the requirements of a particular entity, a hybrid approach may be adopted whereby donors or partners use a case study “umbrella” to explore these diverse elements.

Primary focus = Internal Helps improve the partnership's efficiency and effectiveness / performance		Primary focus = External Helps raise awareness and build credibility for partnership; aids learning for partners and others in the partnering field	
<b>Evaluations</b>	<b>Reviews</b>	<b>Case Studies</b>	<b>Stories</b>
<b>Characteristics</b>			
<ul style="list-style-type: none"> <li>Project /programme focus = technical / functional tracking of activity, contributions &amp; project performance</li> <li>Review efficiency of project / partnership – look at outputs; is the partnership achieving its goals? Has it done what it set out to do?</li> <li>Assess periodic performance – how the partnership is delivering the project / programme during agreed timeframe : monthly, quarterly, mid-term</li> <li>Qualitative &amp; quantitative measurement - focused on data capture &amp; analysis</li> <li>Comprehensive, covers many aspects – long / detailed content</li> <li>Use discrete evaluation methodologies – mostly quantitative</li> <li>Neutral, objective analysis / tone</li> <li>Offers recommendations for improving short-term performance</li> <li>Does not require actors to convene</li> <li>Outcome = report</li> </ul>	<ul style="list-style-type: none"> <li>Partnership, sector, multiple project, organisational, thematic focus = strategic/big picture; comparative</li> <li>Assess impact of partnership activities – looks at outcomes</li> <li>Assess perceived value of partnership for partners</li> <li>End of line performance evaluation – focus on delivery team</li> <li>Participatory approach –use all primary &amp; secondary sources</li> <li>May draw upon data set from evaluations</li> <li>Judgmental; offers critique; time to reflect on possible futures</li> <li>Offers recommendations / next steps for future – forward looking</li> <li>Requires actors to convene face-to-face or virtually</li> <li>Outcome = report</li> </ul>	<ul style="list-style-type: none"> <li>In-depth all-round enquiry – addresses what works and what does not</li> <li>Draws out insights / lessons – project / programme &amp; partnership lens</li> <li>Focuses on the 'why', 'how' &amp; 'so what'</li> <li>May focus on particular point / have a specific investigative goal; have specific set of questions to address / enquiry focus</li> <li>Participatory &amp; secondary data analysis approach</li> <li>Need dissemination strategy to optimise use / benefits</li> <li>Outcome = case study</li> </ul>	<ul style="list-style-type: none"> <li>Anecdotal; snapshot of some specific / discrete event, experience</li> <li>Subjective, emotive, creative</li> <li>Provide human voice / face to partnership</li> <li>Focused on the 'who' &amp; 'what' happened (not 'why' it happened)</li> <li>Useful in PR, communications, advocacy; to engage / get people on board</li> <li>Needs dissemination strategy to optimise use / benefits</li> <li>Outcome = short stories which can be used in different multimedia treatments</li> </ul>
<b>Value</b>			
<ul style="list-style-type: none"> <li>Project level enquiry – project / programme performance assessment</li> <li>Process performance evaluation</li> <li>Funding justification; shows accountability to donors &amp; beneficiaries</li> </ul>	<ul style="list-style-type: none"> <li>Partnership performance evaluation; could take broader look at strategy, all projects handled by partnership, etc</li> <li>Higher level enquiry</li> <li>Benchmarking – standard for future partnerships; evolutionary development</li> <li>Learning – internal uses</li> </ul>	<ul style="list-style-type: none"> <li>Sense-making tool</li> <li>Key learning around themes, issues or questions</li> <li>Develops sector knowledge</li> <li>Teaching &amp; capacity-building</li> <li>Takes practice into theory – contributes to theoretical validation (proves or disproves hypotheses)</li> <li>Benchmarking – evolutionary development</li> </ul>	<ul style="list-style-type: none"> <li>Human voice; human interest – impact on beneficiaries</li> <li>Raising awareness – communication &amp; engagement with internal &amp; external stakeholders</li> <li>Persuades people to dig deeper – seek out case studies</li> </ul>
<b>Audiences</b>			
<p>Internal</p> <ul style="list-style-type: none"> <li>Partners</li> <li>Practitioners /</li> <li>Partnership Brokers</li> <li>Donors</li> <li>Beneficiaries</li> <li>Academics – e.g. researchers</li> </ul>	<p>Internal</p> <ul style="list-style-type: none"> <li>Board of Trustees</li> <li>Partners</li> <li>Partner Organisations</li> <li>Partnership brokers</li> <li>Donors</li> </ul>	<p>External</p> <ul style="list-style-type: none"> <li>Donors</li> <li>Development community</li> <li>Practitioners</li> <li>Policy makers – governments, think tanks</li> <li>Academics</li> </ul>	<p>External</p> <ul style="list-style-type: none"> <li>Donors</li> <li>Development community</li> <li>Beneficiaries</li> <li>Practitioners</li> <li>Policy</li> <li>Media</li> <li>General public</li> </ul>

### 3. The role of partnership brokers in developing learning case studies

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*“In a sense, a broker is continuously using action learning to inform their professional practice. As the term ‘action learning’ implies, learning is an active, not passive, process. Experience, therefore, needs to be actively sought, recorded and analysed if it is to be translated into useful lessons.”*

**Ros Tennyson, 2005**

#### The added value of partnership brokers in case study compilation

Partnership brokers can play an important role in the compilation of learning case studies - as researchers, writers and reviewers. In order to assist partnerships to work effectively, partnership brokers facilitate different points of view and constantly question how things are done. They can thus operate as boundary spanners in the preparation of case studies, promoting understanding and dialogue among partners in order to address particular partnering situations or circumstances rather than adopting a specific position within the partnership. Due to close involvement in the partnerships that they are studying, partnership brokers have traditionally adopted an action research and learning approach to case study work. This approach positions researcher interaction and engagement as central to a case study preparation process that incorporates experience, reflection, learning and action.

#### Internal and external roles

The nature of the role played by a partnership broker in case study compilation will be influenced by whether they are internal or external to a partnership. Some brokers may play an inside role and be involved in producing case studies of partnerships in which their organisation is a partner. An outsider case study role is undertaken by someone who does not have a membership stake in the partnership. Table 4 identifies some of the potential benefits and challenges of these two case study research roles.

	Insider	Outsider
<b>Potential benefits</b>	<ul style="list-style-type: none"> <li>• More in the know</li> <li>• Greater access to data</li> <li>• Existing relationship to key players</li> <li>• Embedding findings</li> <li>• Able to close the learning loop</li> <li>• Internal champion / facilitator</li> <li>• Understanding layers and nuances</li> <li>• Greater passion for the story</li> </ul>	<ul style="list-style-type: none"> <li>• Less emotionally involved / unencumbered</li> <li>• Able to raise tough questions without jeopardising</li> <li>• Perceived 'neutrality'</li> <li>• Picking up on things that insiders may miss</li> <li>• Less vulnerable to power dynamics</li> <li>• External / comparable experience / expertise</li> <li>• More ability to be analytical about data</li> <li>• More equitable in whose story is being told</li> </ul>
<b>Potential challenges</b>	<ul style="list-style-type: none"> <li>• Too emotionally involved</li> <li>• Too influenced by existing relationships</li> <li>• Becoming the vehicle for others' discontent</li> <li>• Confusion about who you are serving</li> <li>• Juggling multiple roles and 'hats'</li> <li>• Case study writing becoming too intrusive</li> <li>• Not being able to discern what is important</li> <li>• Too invested in the need for positive outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Time required to get up to speed</li> <li>• Less alert to the sensitivities</li> <li>• In and out without continuity or capacity to embed learning and evolve practice</li> <li>• Heavily reliant on others to be able to carry out the case study writing role</li> <li>• Being perceived as a 'judge' and resented (confused with being an evaluator)</li> <li>• May miss subtleties of timing (Is the time right to...?)</li> <li>• Risk of missing significant elements if absent</li> <li>• Risk of being manipulated</li> </ul>

**Table 4: Benefits and challenges of insider / outsider case study research roles**

The benefits and challenges highlighted above suggest the usefulness of flagging up insider / outsider roles (and their differences) in ToRs for case study writers. ToRs should incorporate some mention of the challenges that these roles may involve and how they might be compensated. A key method for addressing such challenges is the use of critical friends and peer review processes which support both types of researcher.

If resources permit, an insider / outsider team combination can maximise the benefits and mitigate the challenges implicit in each role. We also believe that it is essential, in both cases, to undertake the research role more consciously as a broker and make individual perspectives very clear and explicit. It is also worth carefully exploring the technologies and tools that are most appropriate for each researcher type. An outsider, for example, may need to have more face-to-face contact, while an insider may prefer to use anonymous surveys or reported information to ensure an element of detachment.

## Partnership brokers as case study reviewers

Partnership brokers can also play an important role as case study reviewers. The case study revision process is likely to involve variety of iterations that require careful facilitation via reflection, debate and discussion before final sign-off. The absence of a proper review mechanism with time and space for feedback can be extremely damaging. As well as frustration from those who feel that they have

not been consulted fully in the development of the study, poor review processes often limit the ability to exploit the rich learning opportunities afforded by both the case study process and findings. Partnership brokers are well-placed to support case study review processes by checking that different partners are satisfied with the way that their comments have been used and shared, especially when directly quoted in personal stories and testimonies; sharing feedback on case study drafts; and holding partner workshops or seminars to debate and reflect upon findings.

## 4. Challenging current donor priorities

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*“If partnership case studies are to be useful tools for change, those seeking to use them in this way need to consider how lessons can be internalised and, where desirable, encourage positive change within individuals, partner organisations, the partnership or external institutions.”*

Sasha Hurrell et al, 2006

### The challenges of developing learning case studies with donors

Although useful and worthwhile, compiling learning case studies for donors can be a challenging process. Why is this the case? Perhaps donors do not want to accept partnering as a complex mechanism? Perhaps they simply want to focus on project results rather than the benefits or added value of partnering? Perhaps their experience of case studies is not good enough? Perhaps they too ‘don’t know what they don’t know’?

Table 5 provides some examples of the different challenges that may arise with donors as the case study process unfolds. It also suggests possible ways of addressing these challenges. Central to this advice is an emphasis on ensuring, right at the start, that Terms of Reference (ToR) are clear and straightforward so that everyone can see the big picture.

Stage of case study preparation	Common challenges	Advice / Tips
1. Before – at start of project / when case study is commissioned	<ul style="list-style-type: none"> <li>Unclear / vague ToR - the donor does not really know what they want or articulates the purpose poorly</li> <li>Ownership within donor for review &amp; sign-off not clear</li> <li>Purpose not defined – learning? PR? etc.</li> <li>Timing – not planned beforehand but ‘hand-picked’ retrospectively; case studies as an ‘afterthought’</li> </ul>	<ul style="list-style-type: none"> <li>Focus first on the ‘why?’ and ‘so what?’ questions rather than process question until support is generated for case study</li> <li>Use positive examples from other case study experiences to show the value to sceptical donors</li> <li>Clearly articulate purpose of case study in ToR and agree SMART outputs (Specific, Measurable, Achievable, Realistic, Time-bound); don’t make assumptions</li> <li>Agree sign-off procedure and editorial rights for case study in ToR; quality assurance of case study should be independently verified</li> <li>Include case study in project design from planning stage with adequate resourcing</li> <li>Clearly define end-users and uses of case study in ToR and plan learning workshops to close feedback loops</li> <li>Agree dissemination plan for case study in ToR</li> </ul>

Stage of case study preparation	Common challenges	Advice / Tips
2. During – during project / when case study is being prepared	<ul style="list-style-type: none"> <li>• New people come on board – change ToR, change priorities, focus, make new or different demands</li> <li>• Donor puts pressure for early completion – changes delivery time</li> <li>• Donor wants editorial rights – edits and ‘sanitises’ material, data, views gathered; tries to influence tone and style; adds extraneous material</li> <li>• Power politics – wants to give more visibility to views / information from some people over others; or wants to present donor in a better / different light</li> </ul>	<ul style="list-style-type: none"> <li>• Be pro-active in brokering relationships with new stakeholders</li> <li>• Refer to ToR for any ‘killer’ changes the donor wishes to make</li> <li>• Revise agreed outputs if donor wishes to change timelines</li> <li>• Follow ToR for sign-off and verification process</li> <li>• Use evidence to back-up case study claims if donor wishes to over-sanitise it or present inequitable visibility</li> </ul>
3. After – at completion of project / when case study is completed and ready for publication	<ul style="list-style-type: none"> <li>• Censorship – heavy editing</li> <li>• Long sign-off process</li> <li>• Cannot agree how dissemination should be done – wants to keep it internal to the project / partnership; wants to control who the case study goes to; wants to ‘sanitise’ it</li> <li>• Reluctant to put case study in public domain</li> <li>• Unclear about assimilation – how case study will be used for organisational learning; unclear how feedback loop is closed for learning; no follow-up</li> </ul>	<ul style="list-style-type: none"> <li>• Pick your battles wisely when it comes to censorship</li> <li>• Meet deadlines promptly to avoid lengthening sign-off</li> <li>• Refer to agreed dissemination plan in ToR</li> <li>• Follow-up case study with learning workshop or other event for end-user, as agreed in ToR</li> </ul>

**Table 5: Identifying and addressing challenges for commissioned case studies**

## Understanding donor drivers for case studies

To assist in building a more open and meaningful process, we have found that it is helpful to position the drivers for a learning case study at the heart of the work. This requires identifying, affirming and often revisiting donor incentives for choosing this form of inquiry. As we have noted above, we need to know a given entity’s drivers for case studies and also be explicit about our approach to case studies.

A donor’s motivations for commissioning a case study may include:

- Answering questions about a partnership project / programme impact
- Asking ‘so what?’ questions of partnership project / programme
- Closing the feedback loop for learning
- Involving all stakeholders
- Addressing internal biases (e.g. independence and transparency)
- Producing tangible, shareable qualitative output
- Sense-making

- Providing evidence that partnering was a real return on investment

In our experience donors often have particular difficulty in understanding the value of a case study as a vehicle for learning. In fact they tend to focus primarily on partnership projects. Indeed, few donors have a track record or clear policy for reflecting internally on case study findings and using the studies as a mechanism for learning. It is thus important for PBA to make the case for situating learning at the core of case study work with donors. This requires insistence on ample resources (time, funding and opportunities) for review and reflection on the case study process and findings. Sharing information from (relatively few) donors that do this and identifying individuals in donor agencies who understand and prioritise a learning approach to case studies can hugely assist this process.

## 5. Capturing ‘messiness’

*“The individuals who can truly find advantage in ambiguity are leading the way; they are the new music-makers. They are the ones who are exploring and creating new worlds.”*

**David J. Wilkinson, 2006**

Compiling a partnership learning case study involves collecting and trying to make sense of a wide variety of complex information from very diverse perspectives. Our approach is to accept that such ‘messiness’ is unavoidable and that it requires careful capture. In order to work with complexity we have developed a set of assumptions that have clear implications for this point of departure (see Table 6).

<b>Assumptions</b>	<b>Implications</b>
<b>The PBA approach should be clearly and confidently articulated</b>	Make our model explicit as a starting point. Affirm that our model can provide a way of organising case studies and drawing out lessons on outcomes, quality of partnership, and partners. Make efforts to engage further with donors who buy into the PBA approach or include it in conventional funding proposals and contracts.
<b>The world is unknowable and we can never fully know the consequences of our interventions (the language of ‘intervention’ is itself value-laden) There is no objectivity - everyone has a point of view While no one has complete control they need to understand and make sense of the world around them</b>	Make sense of what matters by generating insights that can be measured by the quality of conversation / discourse (in line with Socratic dialogue).
<b>Multiple expectations require careful management</b>	Respect confidentiality, tease out hidden agendas and be diplomatic. Accept that there is never a right time to start and that it is the moment that counts. We must aim to do the best possible in the time and resources available to us.
<b>Say it how it is and not how we would like it to be (what others want to hear)</b>	Be honest and keep asking questions.
<b>Do not shy away from complexity</b>	Check on how much “simplicity” is acceptable. Accept that the data precedes the framework as opposed to the framework preceding the data.
<b>Always focus on promoting positive change</b>	Position case studies as learning vehicles that require reflection and action in order to make improvements.
<b>Position case studies as a legitimate method for addressing politics / messiness of the world in a systematic and replicable way</b>	Use the PBA methodology and framework as a licence for partnership brokers to prepare case studies.
<b>Accommodate both qualitative and quantitative research methods and approaches</b>	Apply a range of tried and tested historical / ethnographic methods. Make use of different mediums so that case studies are not just reports but also use visual imagery such as films, pictures, paintings, etc.
<b>Partnership brokers are the case study writers</b>	Build skills and self-confidence among brokers for case study work.
<b>Multi-perspective review processes are essential</b>	Involve all those who have participated in the development of the case study and ensure that they validate the final product.

**Table 6: Capturing messiness: assumptions and implications**

# Useful resources

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## PBA case studies

### **Brokering Local Collaboration**

Study of the impact of partnership brokers training (adapted from PBA's 4-day course and delivered internally) by World Vision at grass roots level

[partnershipbrokers.org/w/wp-content/uploads/2010/08/Brokering-Local-Collaboration-Inquiry-Jan2014.pdf](http://partnershipbrokers.org/w/wp-content/uploads/2010/08/Brokering-Local-Collaboration-Inquiry-Jan2014.pdf)

### **Collaboration Complexity**

Study of collaboration as a key theme in a capacity-building programme of work in Myanmar (PBA being one of the partners)

[partnershipbrokers.org/w/wp-content/uploads/2010/08/Case-Study-Collaboration-Complexity-web.pdf](http://partnershipbrokers.org/w/wp-content/uploads/2010/08/Case-Study-Collaboration-Complexity-web.pdf)

### **Dealing with Paradox**

Study of consortium-building of START Network in its first 3 years

[partnershipbrokers.org/w/wp-content/uploads/2010/08/Consortium-building-story-START-Network-July-2013-web.pdf](http://partnershipbrokers.org/w/wp-content/uploads/2010/08/Consortium-building-story-START-Network-July-2013-web.pdf)

### **Good for Business?**

Study of the impact of investment in partnership brokers training on Microsoft

[partnershipbrokers.org/w/wp-content/uploads/2013/02/GoodForBusiness.pdf](http://partnershipbrokers.org/w/wp-content/uploads/2013/02/GoodForBusiness.pdf)

### **Power & Politics: The Consortium-building Story Continues**

[partnershipbrokers.org/w/wp-content/uploads/2010/08/Power-Politics-case-study-FINAL1.pdf](http://partnershipbrokers.org/w/wp-content/uploads/2010/08/Power-Politics-case-study-FINAL1.pdf)

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*“The PBA case studies are important for a couple of reasons. First, they are as close as we have to a historical record. Second, they share our experience with others who wish to learn. Third, they unveil what is ordinarily hidden behind organisational boundaries, and thus contribute to our legitimacy as a humanitarian system change catalyst.”*

**Sean Lowrie, START Network**