6 Collecting service and user stories

6A Case studies and service case studies

<table>
<thead>
<tr>
<th>Target group:</th>
<th>Library managers and staff involved in new initiatives or services</th>
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<tr>
<td>Method:</td>
<td>Interviews or focus groups</td>
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There are different types of case study, but here we are concerned with those that treat each case as an example of the type of behaviour being studied, to help understand the wider picture. For example, you may wish to look at how your colleagues try to provide services for ethnic minorities in local communities, with each location where this happens being treated as one case. Such a study will also look at how each of these communities respond, in order to see what appears to work best and what can usefully be tried elsewhere.

For our purposes, most service case studies are likely to be constructed by fusing together several instrumental cases, as explained below. Robert Stake (2005) describes this kind of case study as an ‘instrumental case study’. It is also sometimes called a ‘service case study’.

The main decisions to be made when producing service case studies are:

- which cases to base them on
- how to collect the stories
  and (if you are aiming at a synthesis of service cases of different types rather than presenting single stories)
- how to amalgamate them into a representative series of service cases.

When looking at these questions you will also have to decide who will be responsible for editing the stories into service case studies and how to do this.

Taking these decision areas in turn:

1 Choosing your cases

First decide, what is the core of the library story you are trying capture? If you are not sure you may want to ask colleagues in your libraries what issues and questions they are trying to learn about or answer. You might also want to do a quick ‘elicitation survey’ of libraries to get a feel for some of the big themes that may form the core of a story. Such a quick survey simply involves asking a few key questions of library managers about what they think are the main accomplishments, challenges and successes that their libraries have faced or achieved. If you decide to do such a survey, be systematic in your approach to collecting the answers. You can then use the results to decide on your cases. You may also use the early results to develop questions around each of the important topics that emerge in order to collect more detailed systematic evidence.

2 Hearing different voices
If you want your case studies to make a useful contribution to the impact picture, it is important to ensure that you hear from different voices in different parts of the library. You may want to be very systematic in your selection of service points. You can organize and select using key variables (such as location, size, length of time in operation, types of leaders, and other factors that you think may reflect important differences) in order to represent a range of cases. You may later want to group the cases into those that were successful (based on some identified criteria) and those that were not.

3 Best practice or the full range
This is not the only possible approach. In this part of your impact evaluation work you will have to decide whether you want to focus on good practice or on the full range of levels and types of provision. Both approaches can be legitimate (and both have been used in major research studies on the impact of libraries) but it is important to make clear which approach has been chosen, how the choice was made and why. When you report how the choice was arrived at it will be helpful to say who decided what constitutes good practice and what criteria were used.

If you concentrate on best practice you will be able to see what success looks like and how greater impact can be achieved. On the other hand, looking closely at variations between how ‘the best and the rest’ operate should help to show what the best providers are doing differently. This should then give a focus for further evaluation work aimed at finding out how much these difference contribute to overall service impact.

4 Capturing problems
It is important to encourage service managers to report the problems they encountered as part of their stories. Most people are reluctant to share their problems, even if they have overcome them. This tendency is often made worse by an assumption that managerial reports should focus on the outcomes of an initiative rather than the process of getting there. However, we can probably learn more from what goes wrong than from what appears to work well. If you want to get the full picture:

- emphasise to everyone that the aim is to strengthen the service not to apportion blame for any problems encountered
- invite anonymous reporting of problems and potential solutions by setting up small group discussions at any appropriate meeting followed by anonymous feedback of the problems and solutions discussed in each group
- try to get more than one version of the story back from each case study site (but remember that people may decide to compare stories and agree a version).

5 Collecting the service stories
When you have decided where to focus you will need to get people to tell their stories of how they plan, organise and deliver the service locally and what happens when they do so. Some things to bear in mind when collecting case study stories are:

- make sure that you listen to or get evidence from the ‘right people’ who can give you the information that is relevant to the elements of the story that interest you most.
- library staff will probably need help in giving you stories that will be useful. Not everyone is a natural story teller and people working in organisations may not see their own activity as in any way interesting or innovative, even if other people think it is.
Even if they are comfortable in telling their story they will probably need to know what kind of story you want. You should be able to get over any problems here by offering a framework of key questions (see below) or a training workshop to help people get to grips with writing their case study.

- alternatively, you may prefer to centralise the collection activity by calling potential story tellers together in a focus group. People can then be encouraged to recount their stories to each other, pool the results and compare the different experiences described (in other words to combine storytelling with editing the narratives). This type of event requires careful facilitation to ensure that everyone contributes fully.
- feel free to use a variety of methods to collect your cases: in-depth interviews, document reviews, or web-based story collection can all be used.
- whether you focus on best practice or on the full range it is important to get reports of what went wrong (and what was done in response) as well as what worked well. This is difficult, because most organisational reporting structures tend to gloss over mistakes and dubious decisions. Story tellers should be prompted to identify any problems or issues that they encountered as well as to say what will continue to get in the way of success. This aspect of story collection should not be neglected because a ‘good news only’ story is of no use in assessing impact and is not a good basis for advocacy.
- stories do not always have to be told entirely in words. Diagrams, pictures and photographs can all provide powerful testimony as an adjunct to the written word or sometimes as an alternative ‘voice’. However, it is important to remember people’s right to privacy: you will need to get the permission of anyone featured in a photograph before it is published.

6 Turning the stories into service case studies

There are several possible ways of turning the stories that form these cases into case studies:

- treat each story as a service case study in its own right – if you choose this route you may like to offer some structure to your story-tellers by suggesting headings under which to organise their cases (and to indicate an ideal length for each section). This should avoid any major distortions in the case studies caused by some people recording at length what others ignore or treat in a cursory way.
- obtain outside help to turn the cases into case studies – commission a researcher or journalist to synthesise the cases contributed by your colleagues into service case studies. You will need to decide together how to group the cases (e.g. by site or type of service, etc.) and what service features look most important from the cases.
- take on the synthesizing task yourself - the guiding principle here is to focus on the stories not on how you would like them to be. Read the cases closely or listen carefully to the stories and make sure that all the key features of each story are taken into account in the case studies.
- use a collaborative approach to constructing case studies - bring together the people who provide the original cases and get them to help edit them into service case studies. Or you may prefer to organise events at which colleagues contribute their stories and help to edit them into case studies.

Whatever approach you choose, make sure that you provide an opportunity for the people who give you the cases to review and provide feedback on your drafts of the story. You really want it to reflect their voices.
How many service case studies should you produce? This will partly depend on how many different types of service provision and reception emerge from the cases. You will probably want one service case study to represent each of the main variations (in what is done and how users respond) that you see as important.

Useful reference