

## [Service Name] Evaluation Strategy – A Case Study Evaluation

### 1. Introduction

The [Name of service] provides advice and advocacy to individuals who face complex social and legal challenges, including housing insecurity, welfare rights issues, safeguarding risks, and barriers to accessing mainstream services. Support varies in intensity, from one-off advice to ongoing advocacy casework.

Case studies are a method for examining contemporary issues within their real-life context, especially where the boundaries between the issue and its environment are not clearly defined. This evaluation adopts a case study approach to systematically explore the relationship between client needs, service interventions, and resulting outcomes, producing detailed evidence of service impact.

A case study approach has been used for this evaluation as it enables a structured analysis of client experiences over time. This method allows us to examine not only whether change has occurred, but also the mechanisms and contexts through which change happens, for example, tracking how advice on housing rights led to the prevention of an eviction, or how advocacy support enabled a client to access welfare benefits previously denied. It is particularly suited to advice and advocacy work, where clients often present with complex issues and diverse pathways to resolution. The case study method enables the evaluation to identify patterns across client journeys, analyse service responses to different types of need, and highlight areas of operational strength and challenge. It also builds an applied evidence base to inform service development and external reporting.

### 2. What we will do

The evaluation will use a structured case study approach to build a detailed understanding of how the service supports client outcomes. We will document client journeys systematically, capturing needs, actions, outcomes, and context to allow for structured comparison across different types of cases. Using pattern matching and thematic analysis, we will assess whether the outcomes achieved align with the intended results set out in the service's framework. The analysis will generate applied learning about what works, for whom, and under what conditions, drawing directly on principles adapted from Yin's model of case study evaluation.

The evaluation will begin by developing a structured Staff Case Study Form, designed to align with theoretical propositions from the service's Outcomes Framework. Staff will systematically document client journeys, capturing presenting needs, interventions, outcomes, and relevant contextual factors (Yin, 1981). Cases will then be grouped by primary issue type and complexity to enable structured cross-case pattern analysis. Pattern matching techniques will be used to compare observed outcomes against expected outcomes, helping to identify consistencies and variations (Yin, 1981). Thematic analysis will be conducted to explore common mechanisms of change and variations in client experiences across the cases. Where appropriate, elements of logic model tracing will be integrated to link service actions to short, medium, and longer-term outcomes. Aggregated findings will be used to test and refine theoretical assumptions about how the service supports client outcomes (Yin, 1981).

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### 3. Why we will do it

Case studies are particularly useful for evaluating advice and advocacy services where service providers find it difficult to secure a sufficient number of survey responses. However, as a method they offer opportunities for in-depth examination of real-world client journeys, where needs and outcomes are influenced by complex and often overlapping factors. They enable evaluation of not only whether change occurred, but how service interventions contributed to that change. By analysing multiple cases systematically, patterns and variations in service impact can be identified and explored. This approach also supports learning about operational barriers, service strengths, and client experiences within diverse contexts.

The evaluation will provide in-depth evidence of how the service supports change for different types of clients. It will demonstrate service effectiveness through real-world examples, generate learning about common barriers and enablers across client types, and build a structured body of evidence that can inform operational practice and external accountability.

### 4. How we will do it

The evaluation will be delivered across eight structured stages: data audit, measurement design, evaluation strategy, tool design, sampling, data collection, analysis, and reporting. Each stage is designed to build progressively towards a practical and operationally useful evaluation, supporting service improvement, strategic development, and credible outcome reporting.

- Data Audit: At this stage we will conduct a structured data audit to map current case management data, assess what information is available, and identify any gaps that could affect case study development.
- Sampling: At this stage we will select a representative sample of client cases closed during the evaluation period. Sampling will ensure diversity across service type, client demographics, presenting issue, and case complexity.
- Case Study Collection: At this stage staff will complete a structured Case Study Form for each selected case. The form will capture presenting needs, support provided, outcomes achieved, and client reflections if available.
- Case Grouping: At this stage completed case studies will be grouped into broad types based on primary client issue and complexity (e.g., benefit access cases, housing insecurity cases, safeguarding cases). For this stage of the analysis, an Excel spreadsheet will be developed to enable thematic coding of the different case types.
- Data Analysis: At this stage a thematic review will be undertaken across the case studies to identify common patterns, service strengths, barriers encountered, and typical outcomes.
- Reporting: At this stage evaluation reporting will present grouped case studies supported by thematic analysis, highlighting service impact across different client types and outcome areas.

### 5. Timeline

The evaluation activities will be delivered in a structured sequence to ensure that data collection, analysis, and reporting are completed efficiently and to a high standard. The table below sets out the key activities and expected timeframes for each stage of the evaluation process.

Activity	Start Date	End Date
Conduct data audit	[Insert Start Date]	[Insert End Date]
Finalise evaluation tools (survey and topic guide)	[Insert Start Date]	[Insert End Date]
Client survey data collection	[Insert Start Date]	[Insert End Date]
Client and staff interviews/focus groups	[Insert Start Date]	[Insert End Date]
Data analysis	[Insert Start Date]	[Insert End Date]
Draft evaluation report	[Insert Start Date]	[Insert End Date]
Final evaluation report	[Insert Start Date]	[Insert End Date]

6. Appendices

The following materials will be included in the appendix to support the evaluation process:

- The Standardised Advice and Advocacy Outcomes Survey
- The Qualitative Interview and Focus Group Topic Guide
- The Outcomes Framework.

These tools form the core of the evaluation approach and provide the structures needed for consistent data collection, outcome measurement, and qualitative exploration across the service.

How to Cite This Work

Community Impact CIC (2025). Advice and Advocacy Evaluation Toolkit: Practical Guide and Tools for Impact Measurement. London: Community Impact CIC.

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