

APRPREP Online Prep Course

Checklist for submitting case study for review and critique

Candidate name:

Case study name:

Date:

- This is a
- First draft
 - Request for preliminary check through steps 2, 3 or 4 (or as noted) _____
 - Revised draft
 - Further revised draft

Check the box if your case study includes:

- The Situation:** One or two paragraphs describing the background of the problem you are expected to deal and the circumstances creating or affecting the problem.
This may be called Situational Analysis.
- Step One: Research.**
 - Each research activity **labeled** as primary/secondary, formal/informal; qualitative/quantitative. This may be work you have done or expect to do.
Activities of the same kind may be listed in groups.
 - Each research activity shown by **type** (survey, interview, focus group, etc.), the **source** of the information (neighbors, company officials, customers, etc.) and the **rationale** for doing this activity (what you expect to learn; how you will use that information).
 - If the research has been done, a summary, **Findings from Research**, perhaps a paragraph or two. Length will depend on the results, but be succinct.
 - A **problem statement**, reflecting the findings from research. Perhaps one paragraph.
 - If the research has not yet been done, problem stated as well as you can from the information you now have.
- Step Two: Goal or goals.** One, two or three. [If more, explain.]
 - A broad statement of the end result you hope to achieve.
Good one: Bus routes and schedules will efficiently serve the needs of the community.
Not-so-good one: Revise bus routes and schedules to better serve the community.
[The culprit here is the word 'revise.' That's an action, not a result. Write results.]
- Step Three:** A list of five (5) key publics, audiences or constituent groups.
Be sure these are the most significant for success.
Tips: Who needs to know?, who will be affected?, whose permission do we need?, whose advice do we want? . . .

- ❑ **Step Four: Objectives.** For one of these groups, one short-term objective and one long-term objective pointing toward your goal.
 - Work with two target groups if you wish, but don't tackle all of them for this study.
 - ❑ Each objective **written as a result.** It has four components: The target group, the result you desire, the amount you hope to achieve, and the time for completion.
 - Good one:** Within FY10, positive beliefs, attitudes and feelings that employees personally contribute to the industry will have risen by 10%.
 - Not-so-good one:** Increase by 10% positive beliefs, attitudes and feelings that employees personally contribute to the industry within FY10
The culprit is 'increase' as an active verb. Show result with passive verb or adjective.

- ❑ **Step Five: Strategies.** For each objective, showing HOW to work toward the objective.
 - Good one:** Develop internal thought leaders through professional development and trade associations on a local and national level
 - Another:** Engage managers in the process
 - Another:** Use social media to test effectiveness with this target group

- ❑ **Step Six: Main message**
 - A sentence or phrase to be repeated in communication with the target group
 - Good one:** This is a stable but progressive company with the vision to institute change
 - Another:** Strikes are ineffective in lowering prices.

- ❑ **Step Seven: Tactics to carry out strategies**
 - ❑ Three tactics or tools per strategy. Subunits of that strategy

- ❑ **Step Eight: Spokespersons**
 - ❑ One for each tactic

- ❑ **Step Nine: Costs**
 - Actual or estimates, in dollars, hours or other units
 - ❑ Out-of-pocket
 - ❑ Staff and volunteer time
 - ❑ In-kind donations

- ❑ **Timetable**
 - Gantt chart or some other chart to show sequence of activity concisely

- ❑ **Evaluation against objectives**
 - Means of checking progress on accomplishing short-term and long-term objectives
 - Opportunity for course correction?
 - These may appear in timetable

- ❑ **Evaluation against goal**
 - Means of determining progress toward goal or goals
 - This may appear in timetable

Notes: